



WINEMETRICS

2014 Fine Dining Wine Distribution Report

Includes Upscale Casual Dining and Luxury
Wine Supplement



WINEMETRICS

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Introduction

This is the inaugural edition of *Winemetrics' Fine-Dining Wine Distribution Report*. The wine lists used in this report were compiled in the second half of 2014 with new list data added and updated through Q4. Over 120 fine-dining and select upscale casual-dining chains and restaurant groups, representing over 2,500 accounts nationwide, were surveyed for this report. In many of the larger restaurant groups we have surveyed multiple chains. As with all of our reports, we limit our survey to lists with fewer than 500 wines by the 750 ml. bottle so as to prevent accounts with vast wine selections from skewing our data.

This report follows the format of our annual On-Premise Wine Distribution Report. As a bonus, we have included a separate analysis of the Luxury Wine segment, wine price at or above \$50 on wine lists. While this was released as a separate report in 2013, it will henceforth be incorporated into our Fine Dining Wine Distribution Report. Essentially our 2014 Fine-Dining Report is two reports in one. Since our fine-dining account base was expanded in 2014, we will not be able to offer trend analysis in this edition but it will be provided in future reports.

Our 2014 Supplier Report will be released in Q2 of 2014 and will provide details on the distribution of the top 50 suppliers in all segments of our database, from casual dining to our newly expanded fine-dining account base.

Should you wish to acquire more detailed information about specific US markets or wine varieties, regions or brands, please contact us at info@winemetrics.com.

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About Winemetrics

Winemetrics is the leading source of on-premise wine information and analysis, and provides the most complete, objective wine market intelligence available. The founder of Winemetrics, Charles Gill, has over 30 years of experience at all levels of the wine industry and has been providing on-premise wine distribution analysis to the industry for the past decade.

In addition to our annual reports, Winemetrics provides custom analysis of supplier portfolios via its Trilogy Reports and in-depth analysis of distribution opportunities in specific chains with its Wine List Analysis Reports. For more information and demos of our leading-edge products, please email us anytime at info@winemetrics.com.

List of Major Restaurant Chains/Groups Used in Our Sample

Ark Management	Harry Caray's	Patina Restaurant Group
Back Bay RG	Hillstone Restaurants	Jean-Georges RG
BLT Steak	Hugo's Frog Bar	Perry's Steakhouse
Bluewater Grill	Hyde Park Steakhouse	PF Changs
Bonefish Grill	Il Fornaio	Piatti
BR Guest	J. Alexanders	PJ Clarkes
Bravo Brio RG	J. Gilberts	Quaintance Weaver
Buckhead Life RG	Jax Fish House	RA Sushi
Burton's Grill	Jimmy's American Tavern	Reata
Cameron-Mitchell	Joe's Seafood	Redstone Grill
Capital Grille	Joe's Stone Crab - Miami	Restaurants Unlimited
Catch 35	Joey	Roots Steakhouse
Chart House	Johnny's Italian Steakhouse	Rosa Mexicano
Chuck's Steakhouse	Keg Steakhouse	Roy's
Clyde's Restaurant Group	Kent Rathbun RG	Ruth's Chris
Cordua Restaurants	Kimpton Restaurants	Salt Creek Grille
Crave	Kincaid's	Schwartz Bros.
Del Frisco's Grill	King's Fish House	Seasons 52
Devon Seafood	Kona Grill	Select Restaurant Group
District Chophouse	Landry's Seafood	Shula's
Donovan's Steakhouse	Legal Seafood	Smith & Wollensky's
Eddie Merlot's	LEYE	Spice Market
Eddie V's	Maggianos	Starr Restaurant Group
El Gaucho	Marlow's Tavern	Stefani Restaurant Group
Finn & Porter	Mastro's	Stonewood Grill
Firebirds Grill	McCormick & Schmick's	Strategic Hospitality - Tao
Fishmarket	Melting Pot, The	Striphouse
Flemings	Mike Ditka's	Sullivans
Fogo de Chao	Newport Restaurant Group	Sushi Samba
Fourth Wall Restaurants	Morton's	Tavistock
Francesca's	Nobu	The Chophouse
Gibson's Steakhouse	Not Your Average Joes	The Prime Rib
Grand Central Oyster Bar	Ocean Prime	Think Food Group
Grand Lux	Oceanaire	Truluck's
Great American Restaurants	Old Ebbitt Grill	Union Square Hospitality
Grill on the Alley	Palomino	Village Tavern
Grillsmith	Papa Razzi	Willie G's
Grimaldi's	Pappas Bros. RG	Wolfgang Puck Restaurants
Harris Inn & Ranch	Passion Food Group	

Part I: By the Bottle (BTB) Distribution Analysis

By The Bottle (BTB) Analysis Summary

Breakdown by Wine Type

Red Still wines predominate in the fine-dining sector with nearly 2/3 of the total distribution. White still wines have less than 30% distribution with sparkling wines account for 7% of the total.

BTB byType	# BTB	% Share
Still	27916	92.9%
Red, Still	19212	63.9%
Rose, Still	367	1.2%
White, Still	8335	27.7%
Sparkling	1988	6.6%
Dessert	75	0.2%
Fortified	52	0.2%
Total	30032	

Breakdown by Country of Origin

Nearly two thirds of all listings are from U.S. producers with 56% from California alone. France and Italy are tied at 11% with Argentina and Spain rounding out the top 5.

BTB Listings

Country	# Listings	Ave. Price	% Share
U.S.	18795	\$87.26	62.6%
California	16412	\$90.20	54.6%
Oregon	921	\$70.91	3.1%
Washington	1358	\$68.43	4.5%
Other	137		0.5%
France	3339	\$138.98	11.1%
Italy	3290	\$82.13	11.0%
Argentina	1016	\$59.97	3.4%
Spain	891	\$71.76	3.0%
Australia	745	\$81.64	2.5%
New Zealand	611	\$49.41	2.0%
Chile	573	\$65.24	1.9%
Germany	274	\$45.98	0.9%
South Africa	141	\$48.53	0.5%
Austria	124	\$50.97	0.4%
Portugal	95	\$93.65	0.3%

BTB Breakdown by Variety

Cabernet Sauvignon leads all varieties with nearly a fifth of all distributio

Variety	# BTB Listings	% Share
Cabernet Sauvignon	5584	19%
Chardonnay	3557	12%
Pinot Noir	3104	10%
Merlot	1855	6%
Bordeaux Blend	2113	7%
Sauvignon Blanc	1494	5%
Brut	1433	5%
Pinot Grigio/Gris	965	3%
Riesling	762	3%
Red Blend	863	3%
Malbec	749	2%
Syrah/Shiraz	907	3%
Zinfandel	784	3%
Sangiovese	695	2%
Rhone Blend	451	2%
Other	3442	11%

BTB Breakdown by Price

In Winemetrics fine-dining account base, the \$60-\$99.99 price segment has the largest share. Nearly one quarter of all listings are priced over \$100.

BTB Price Segment	# Listings	% Share
<\$25.00	590	2%
\$25-\$39.99	5984	20%
\$40-\$59.99	7719	26%
\$60 - \$99.99	8552	28%
\$100-\$149	4005	13%
\$150-\$199	1452	5%
\$200+	1655	6%

Supplier Supplement Excerpt

Top 10 Fine Dining Suppliers By the Bottle (BTB) and By the Glass (BTG)

(Note: Winemetrics' Fine-Dining Wine Distribution Report lists the top 25-50 producers in most categories)

Constellation Brands is the leading supplier in our fine dining universe followed very closely by Ste. Michelle Wine Estates.

Total BTB Listings				Total BTG Listings		
Supplier	# BTB	% Share	Rank	Supplier	# BTG	% Share
Constellation Brands	1595	5.3%	1	Constellation Brands	640	7.1%
Ste. Michelle Wine Estates	1563	5.2%	2	Ste. Michelle Wine Estates	553	6.1%
Terlato	1190	4.0%	3	E&J Gallo	444	4.9%
Kobrand	1234	4.1%	4	Treasury Wine Estates	368	4.1%
Treasury Wine Estates	1063	3.5%	5	Terlato	335	3.7%
E&J Gallo	719	2.4%	7	Trincherro	306	3.4%
Jackson Family Wines	848	2.8%	8	Jackson Family Wines	288	3.2%
Moet-Hennessy USA	960	3.2%	9	Kobrand	266	2.9%
Palm Bay International	734	2.4%	10	Palm Bay International	239	2.6%

Luxury Wine Supplement Excerpt

Top 10 Producers On-Premise in Luxury Wine Segment (over \$50/bottle wine list price)

Cakebread is by far the most popular brand in the luxury wine segment with over a third more BTB listings than second-ranked Veuve Clicquot.

Rank	Producer	# Listings	Ave. Price
1	Cakebread	372	\$98.68
2	Veuve Clicquot	271	\$129.59
3	Caymus	270	\$153.34
4	Franciscan	229	\$70.68
5	Stags' Leap Winery	228	\$82.10
6	Stag's Leap Wine Cellars	222	\$120.68
7	Jordan	195	\$95.24
8	Silver Oak	193	\$152.53
9	Antinori	191	\$147.66
10	Duckhorn	184	\$100.69