



# WINEMETRICS

## 2014 On-Premise Wine Distribution Report

Includes Supplier Supplement



WINEMETRICS

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## Introduction

This is sixth edition of **Winemetrics** *On-Premise Wine Distribution Report*. The wine lists used in this report were compiled in the second half of 2014 with new list data added until mid-October of this year. We have carefully matched our 2014/2013 account samples to provide extremely accurate trend analysis this year. A handful of declining and bankrupt chains were replaced with chains of the same size and type to preserve a consistent sample across both years. A total of 176 restaurant groups and chains were used from both 2013 and 2014 which we hope will remain relatively consistent in the future. However, as Winemetrics has greatly expanded its survey of national and regional restaurant groups and chains to over 250, we will be increasing the scope of our other reports.

Winemetrics 2014 Supplier Report which provides detailed distribution analysis of the top 50 supplier portfolios, will include over 200 chains in its analysis including Applebee's, TGI Friday's and other casual chains not included in our more 'winecentric' reports. Conversely, Winemetrics 2014 Luxury Wine Report will include additional fine-dining venues and will provide both BTB analysis of \$50+ wines and BTG analysis of wines in the \$12+ segment.

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](mailto: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](mailto:info@winemetrics.com).

## About Winemetrics 2014 On-Premise Report

From May, 2014 to October, 2014, we once again sampled a representative group of wine lists from 176 national and regional chains and restaurant groups. This account sample represents over 10,000 restaurants nationwide and provides a very real picture of the wines being ordered and consumed on-premise. In order to maintain congruent trend analysis we will continue to maintain this wine-oriented account set for our annual On-Premise Wine Distribution Report. However, since our database has grown to over 250 chains, this new, larger data set will be employed in our annual Supplier and Luxury Wine Report.

This year we replaced approximately 12% of the chains in our survey, replacing declining and defunct chains with those of the same type and cuisine that promise future expansion.

Here are some highlights from our 2014 On-Premise Wine Distribution Report:

- This year was the first where the number of chain locations rose while the overall listings fell.
- A number of major nation casual dining chains reduced their wine selections and it appears that this trend will continue
- A number of varieties that have experienced continuous annual growth since 2007 appear to have peaked. The popular Italian varieties, Pinot Grigio/Gris and Moscato are among this group as is Riesling.
- As wine lists are reduced, second-tier red varieties are losing distribution including Syrah/Shiraz, Zinfandel and Bordeaux Blends. It also appears that these varieties are being replaced with Red Blends\*. Even Merlot may be a target of these largely proprietary blends.

\*Winemetrics considers Red Blends to be non-traditional combinations of red varieties as opposed to Bordeaux Blends, Rhone Blends and Super Tuscans which are tabulated separately.

A list of the national and regional chains and restaurant groups is included on the following page.

Also, please note that as we are including both *By the Bottle (BTB)* and *By the Glass (BTG)* distribution analysis in this report, all graphs and tables will be labeled *BTB* or *BTG* to indicate the source of the data.

**Note:** As our account bases in 2014 and 2013 are very congruent, all % Change calculations are based on changes in actual listings, not differences in % Share as was the practice in our 2013 On-Premise Wine Distribution Report.

## List of Major Restaurant Chains/Groups Used in Our Sample

99 Restaurant	Devon Seafood	Kona Grill	Red Lobster
American Tap Room	Dos Caminos	Landry's Seafood	Red Robin
Anthony's CF Pizza	Duffy's Sports Grill	Lazy Dog	Red Rock Canyon
Axel's Bonfire	Duke's Chowderhouse	Lee Roy Selmon	Redstone
Bahama Breeze	Eddie Merlot's	Legal Seafood	Rockbottom
Bandera	Eddie V	Logan's Roadhouse	Rockfish
Bar Louie	Elephant Bar	Lone Star	Romano's MG
Benihana	Famous Dave's	Longhorn Steakhouse	Roy's
Bertucci's	Finn & Porter	Lucille's BBQ	Ruby Tuesday
Biaggis	Firebirds	Lucky Strike	Russo's Pizza
Big River Grille	Fish City Grill	Maggianos	Rusty Bucket, The
BJs	Fishmarket	Marlow's Tavern	Ruth's Chris
Black Angus	Flanigan's	McCormick & Schmick's	Salt Creek Grille
Bluewater Grill	Flemings	Melting Pot, The	Saltgrass Steakhouse
Bonefish Grill	Francesca's	Miller's Ale House	Seasons 52
Brass Tap, The	Giordano's	Mimi's Café	Shaw's
Bravo	Gordon Biersch	Mitchell's	Smokey Bones
Brick House	Grand Lux	Mon Ami Gabi	Spaghetti Warehouse
Brio	Granite City	Morton's	Stanford's
Brixx Pizza	Grillsmith	Nobu	Stir Crazy
Buca di Beppo	Grimaldi's	North	Stonewood
Burton's Grill	Hard Rock Café	Not Your Average Joes	Stoney River
CA Pizza Kitchen	Harry Caray	Ocean Prime	Sullivan's
Cantina Laredo	Haru Sushi	Oceanaire	Sushi Samba
Capital Grille	Hennessey's	O'Charley's	Tahoe Joe's
Carino's	Hillstone	Old Chicago	Ted's Montana Grill
Carolina Ale House	Hooked on Harry's	Old Spaghetti Factory	Texas de Brazil
Carrabbas	Houlihan's	Olive Garden	Texas Land & Cattle
Catch 35	Houstons	Original Roadhouse	The Chophouse
Cattlemens	Hyde Park Steakhouse	Osha Thai	The Pub
Champps	Il Fornaio	Outback	Timpano Chophouse
Charleston's	Islamorada	Palomino	Tommy Bahama
Charlie Browns	Islands Burgers	Papa Razzi	Tony Roma's
Chart House	J. Alexanders	Papa Vino's	Truluck's
Cheddar's	J. Gilberts	Pappadeaux	Umami Burger
Cheesecake Factory	Jax Fish House	Pappasitos	Uno Chicago Grill
Chin Chin	Joes American	PF Changs	Village Tavern
Chuck's Steakhouse	Joe's Crab Shack	Phillips Seafood	Wildfire
Claim Jumper	Joe's Seafood	Plan B Burgers	Willie G's
Copeland's	Joey	Quarterdeck	Winberie's
Copper Canyon	Johnny's Italian Steakhouse	QWRH (Lucky 32)	Wood N' Tap
CRAVE	Keg Steakhouse	RA Sushi	Wood Ranch BBQ
Daily Grill	Kincaid's	Rainforest Café	Yard House
Dave & Buster's	King's Fish House	Ram Brewery	Z Tejas

## Part I: By the Bottle (BTB) Distribution Analysis

### By The Bottle (BTB) Analysis Summary

#### *Breakdown by Wine Type*

White wine listings fell by -7%, which was balance by by increases in roses and sparkling wines, each expanding by 12%. Losses in red wine distribution were generally in line with the overall reduction in BTB listings.

<b>BTB Listings</b>	<b>2014</b>	<b>% Total</b>	<b>2013</b>	<b>% Total</b>	<b>% Change</b>
<b>All</b>	35237		36230		-3%
<b>Wine, Still</b>	33256	94.4%	34466	95.1%	-4%
<b>Red</b>	20491	58.2%	21016	58.0%	-2%
<b>Rose</b>	1165	3.3%	1039	2.9%	12%
<b>White</b>	11600	32.9%	12411	34.3%	-7%
<b>Wine, Sparkling</b>	1935	5.5%	1724	4.8%	12%
<b>Wine, Other</b>	46	0.1%	40	0.1%	15%

#### *Breakdown by Country of Origin*

France, Chile, New Zealand, Spain and Argentina all expanded share and listings 2014. Australia posted the greatest decline, losing nearly a third of its listings, primarily due to a decline in Syrah/Shiraz. Germany's loss of distribution was due directly to Rieslings -7% decline in distribution. France achieved incremental growth across a number of varieties and benefitted directly from the 12% increase in rose wines.

<b>BTB Listings</b>					
<b>Country</b>	<b>2014</b>	<b>% Total</b>	<b>2013</b>	<b>% Total</b>	<b>% CHG</b>
All	35237		36230		-2.7%
U.S.	22908	65.0%	23517	64.9%	-2.6%
Italy	5813	16.5%	6123	16.9%	-5.1%
France	2116	6.0%	1868	5.2%	13.3%
Argentina	1122	3.2%	1073	3.0%	4.6%
Australia	1005	2.9%	1516	4.2%	-33.7%
New Zealand	733	2.1%	637	1.8%	15.1%
Spain	575	1.6%	530	1.5%	8.5%
Chile	489	1.4%	422	1.2%	15.9%
Germany	257	0.7%	326	0.9%	-21.2%
South Africa	97	0.3%	105	0.3%	-7.6%
Other	122	0.3%	113	0.3%	8.0%

### *BTB Breakdown by Variety*

The big story here is the surge in Red Blends (+45%) which have stolen share from Syrah/Shiraz, Zinfandel, Merlot and even lesser expensive Bordeaux Blends. Prosecco was the only other big winner in 2014, continuing its climb with a +23% increase. Declining distribution was more prevalent in 2014 with both Sangiovese and Pinot Grigio dropping double-digits as large Italian casual dining chains reduced listings.

<b>BTB Listings</b>	<b>2014</b>	<b>% Share</b>	<b>2013</b>	<b>% Share</b>	<b>% Change</b>
All	35237		36230		-3%
Cabernet Sauvignon	5554	15.8%	5724	15.8%	-3%
Chardonnay	4648	13.2%	4885	13.5%	-5%
Pinot Noir	3373	9.6%	3450	9.5%	-2%
Merlot	2833	8.0%	3132	8.6%	-10%
Pinot Grigio/Gris	1968	5.6%	2245	6.2%	-12%
Sauvignon Blanc	1703	4.8%	1665	4.6%	2%
Bordeaux Blend	1383	3.9%	1536	4.2%	-10%
Red Blend	1352	3.8%	931	2.6%	45%
Riesling	1295	3.7%	1392	3.8%	-7%
Brut	1179	3.3%	1099	3.0%	7%
Sangiovese	1042	3.0%	1381	3.8%	-25%
Moscato Bianco	1002	2.8%	1037	2.9%	-3%
Malbec	1001	2.8%	971	2.7%	3%
White Zinfandel	913	2.6%	1060	2.9%	-14%
Zinfandel	911	2.6%	1072	3.0%	-15%
Syrah/Shiraz	839	2.4%	893	2.5%	-6%
White Blend	496	1.4%	526	1.5%	-6%
Prosecco	466	1.3%	380	1.0%	23%

## *BTB Breakdown by Price*

The largest BTB segment, \$25-\$39.99, lost share as it bore the brunt of reduced listings in casual dining restaurants. Industry price increases for existing wines probably account for the growth in the \$40-\$59.99 and \$60-100 segments.

### **BTB Distribution by Price Segment**

<b>BTB Price Segment</b>	<b>2014</b>	<b>% Share</b>	<b>2013</b>	<b>% Share</b>	<b>% Change</b>
<\$25.00	5821	17%	5692	16%	2%
\$25-\$39.99	13198	37%	15447	43%	-15%
\$40-\$59.99	6807	19%	6237	17%	9%
\$60 - \$100	5529	16%	4766	13%	16%
\$100+	3681	10%	3757	10%	-2%
No Pricing	210	1%	331	1%	-37%

Some highlights from the 2014 On-Premise Wine Distribution Report are listed below. We did not expect many surprises this year, thinking that the improving economy would stabilize existing distribution but that did not prove to be true. This year provided some major gains and losses to leading brands as major national chains adjusted their wine selections..

#### **Producer News:**

- Francis Coppola and Cavit break into the top 5 BTB producers
- Mondavi Private Selection and 14 Hands become top 10 brands for the first time, a result of new distribution in major national chains.
- Ravenswood fell from the top 10, a victim of declining Zinfandel distribution
- Santa Margherita also lost its top 10 position as Pinot Grigio/Gris distribution fell in 2014.

#### **Supplier News**

- Among the top 10 suppliers, Palm Bay International and Francis Coppola experience a significant increase in ranking
- Foley Family and The Wine Group enter the top 20 suppliers for the first time
- Rodney Strong, Duckhorn and Hess Family Estates are counted among the top 25 suppliers this year.
- TGIC Importers, Frederick Wildman & Sons, Charles Smith and King Estate climbed significantly among the top 40 suppliers.
- Pernod Ricard, Diageo and Terroir Selections tumbled in 2014.



***Top 25 Brands ByThe Bottle***

***(Note: Winemetrics On-Premise Wine Distribution Report list the top 50 producers in most categories )***

<b>2014</b>				<b>2013</b>		
<b>Producer</b>	<b># Listings</b>	<b>Ave. Price</b>	<b>Rank</b>	<b>Producer</b>	<b># Listings</b>	<b>Ave. Price</b>
Chateau Ste. Michelle	1035	\$40.02	1	Chateau Ste. Michelle	965	\$35.43
Beringer	825	\$42.58	2	Beringer	964	\$40.77
Kendall-Jackson	737	\$38.32	3	Kendall-Jackson	755	\$36.38
Francis Coppola	526	\$41.79	4	Sutter Home	653	\$20.08
Cavit	514	\$24.79	5	Ecco Domani	550	\$25.91
Ecco Domani	510	\$25.59	6	Francis Coppola	438	\$39.07
Sutter Home	497	\$20.23	7	J. Lohr	434	\$36.65
J. Lohr	433	\$38.18	8	Ruffino	424	\$46.14
14 Hands	392	\$30.33	9	Ravenswood	388	\$35.52
Mondavi Private Select.	358	\$27.97	10	Santa Margherita	359	\$49.60
Ruffino	354	\$50.95	11	Clos du Bois	352	\$41.58
Banfi, Castello	327	\$58.35	12	Blackstone	348	\$28.87
Columbia Crest	324	\$30.73	13	Antinori	344	\$76.15
Mirassou	316	\$27.60	14	Mondavi Private Select.	332	\$28.40
Ravenswood	292	\$34.08	15	Mirassou	324	\$26.80
Santa Margherita	290	\$50.29	16	Jacob's Creek	322	\$29.88
Cakebread	288	\$92.31	17	Columbia Crest	320	\$27.65
Clos du Bois	288	\$43.42	18	Franciscan	318	\$60.85
Franciscan	279	\$60.27	19	Seven Daughters	304	\$29.85
Estancia	264	\$43.95	20	Woodbridge	303	\$22.40
Blackstone	263	\$28.88	21	Cultivate	296	\$28.50
Rodney Strong	262	\$56.31	22	Caymus	288	\$101.07
Penfolds	258	\$104.29	23	Banfi, Castello	285	\$50.58
Sonoma-Cutrer	251	\$52.03	24	Estancia	283	\$41.26
Red Diamond	248	\$28.04	25	Sonoma-Cutrer	270	\$49.59