



WINEMETRICS

2017 Luxury Wine On-Premise Distribution Report

Featuring 2017-2016 Trend Analysis

Includes 2018 Supplier Rankings by Variety



WINEMETRICS

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Introduction

Welcome to our fourth, 2017 edition of Winemetrics' *Luxury Wine Distribution Report*. We should probably call this the 2017-18 Luxury Wine Distribution Report as it based on a survey of wine lists conducted from late 2017 through Q2 of 2018.

Unlike our On-Premise Wine Distribution Report which uses a standardized survey sample year after year, our Luxury Wine Report is based on our entire database of accounts, capturing all listings over \$50/bottle and \$13.00/glass. This report is also significantly different than our Fine Dining Wine Distribution Report which captures all listings in our Fine Dining and Upscale Casual restaurant database but does not cover Casual Dining chains and restaurant groups.

Winemetrics 2017 Luxury Wine On-Premise Wine Distribution Report provides rankings and BTG/ BTB wine listing totals for both producers and supplier by variety and country of origin (including California, Washington and Oregon).

Winemetrics surveys a representative group of wine lists from over 250 national and regional chains and restaurant groups. Just over 170 of these chains were included in this report, which represent over 5,000 restaurants nationwide and provide a very real picture of the luxury wines being ordered and consumed on-premise in national and regional chains and restaurant groups.

Our 2017 Luxury Wine On-Premise Distribution Report is divided into 4 sections. The first provides distribution analysis by variety and the second offers analysis by country of origin. The third provides supplier profiles by variety and producer while the fourth and final section provides a ranking of suppliers, both BTB and BTG, by variety.

Should you wish to acquire more detailed information about specific suppliers or wine varieties not listed in this report, 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 alcoholic beverage industry and has been providing the wine industry with on-premise wine distribution analysis for the past decade.

List of Major Restaurant Chains/Groups Used in Our Sample

110 Grill	Earl's	Lazy Dog	Rock & Brews
Anthony's CF Pizza	Eddie Merlot's	Legal Seafood	Rock Center Café
Atlanta Fish Market	Eddie V's	Lucky Strike	Roots Steakhouse
Atlantic Grill	Finn & Porter	Maggianos	Roy's
Benihana	Firebirds	Maloney & Porcelli	Russo's Pizza
Bertucci's	Fishmarket	Marlow's Tavern	Rusty Scupper
Biaggis	Flanigan's	Mastro's	Ruth's Chris
Black Finn	Flemings	Matchbox Pizza	Salt Creek Grille
BLT Steak	Fogo de Chao	McCormick & Schmick's	Saltgrass Steakhouse
Blue Smoke	Francesca's	Mellow Mushroom	Sea Grill
Blue Sushi Sake	GCT Oyster Bar	Melting Pot, The	Seasons 52
Bluewater Grill	Gene & Georgetti	Mike Ditka's	Sedona Taphouse
Bonefish Grill	Gibson's Steakhouse	Miller's Ale House	Shaw's
Bravo	Gordon Biersch	Mitchell's	Shula's
Brio	Grand Lux	Mon Ami Gabi	Sizzling Steak Concepts
Bryant Park	Granite City	Morton's	Stanford's
Buca di Beppo	Grill on the Alley	Nick & Stef's	Stonewood
Buddakan	Grillsmith	Nobu	Stoney River
Burton's Grill	Grimaldi's	North	Sullivan's
Cantina Laredo	Hard Rock Café	Not Your Average Joes	Sushi Samba
Capital Grille	Harris Ranch Inn	Ocean Prime	Tahoe Joe's
Carrabba's	Haru Sushi	Oceanaire	Tao - Uptown
Catch 35	Hillstone	Old Ebbitt Grill	Tavern on Rush
Cattlemens	Houston's	Old Spaghetti Factory	Ted's Montana Grill
Chamberlain's	Hugo's Frog Bar	Olive Garden	Texas de Brazil
Chart House	Hyde Park Steakhouse	Paddlefish	The Chophouse
Cheesecake Factory	Il Fornaio	Palomino	The Mooring
Churrasco's	J. Alexanders	Papa Razzi	The Palm
City Tap House	J. Gilberts	Pappadeaux	The Pub
Claim Jumper	Jasper's	Passionfish	Thirsty Lion
Cleo	Jax Fish House	Paul Martin's	Tommy Bahama
Clyde's	Jimmy's Fam. Am. Tavern	Perry Street	True Food Kitchen
Coastal Flats	Joes American	Perry's Steakhouse	Truluck's
Copeland's	Joe's Seafood	PF Changs	Tuscany-SRG
Copper Canyon	Joey	Phillips Seafood	Village Tavern
CRAVE	Johnny's Italian Stkhse	Piatti	Wildfire
Daniel's Broiler	Katsuya	PJ Clarkes	Willie G's
Del Frisco's Grille	Keg Steakhouse	Prime Rib	Winberies
Denver Chophouse	Kincaid's	Punch Bowl Social	Wolfgang Puck B&G
Devon Seafood	King's Fish House	QWRH	Wood Ranch BBQ
Dos Caminos	Kona Grill	Reata	Yard House
Duke's Chowderhouse	Kimpton Rest. Group	Redlands	
El Gaucho	Landry's Seafood	Redstone Grill	

The following are excerpted sections of the 2017 Luxury Wine Distribution Report

Overview of Luxury Wine Segment

BTB Distribution by Type

Red still wine accounts for nearly $\frac{3}{4}$ of BTB distribution in the Fine Dining segment and nearly 60% of BTG distribution. Sparkling wine accounts for over 10

Type/Color	2017			2016			% Chg Listings
	# Listings	Ave. Price	% Share	# Listings	Ave. Price	% Share	
Dessert	32	\$89.69	0.1%	51	\$119.30	0.2%	-37%
Fortified	96	\$124.00	0.4%	105	\$133.54	0.5%	-9%
Sparkling	1596	\$169.33	7.2%	1681	\$160.26	8.0%	-5%
Still	20403	\$117.03	92.2%	19124	\$115.89	91.2%	7%
Red	15743	\$129.12	71.1%	15161	\$126.98	72.3%	4%
Rose	126	\$63.42	0.6%	127	\$64.87	0.6%	-1%
White	4534	\$81.16	20.5%	3836	\$78.29	18.3%	18%
Grand Total	22127	\$120.96		20961	\$119.39		6%

BTB Distribution by Country

The U.S. dominates BTB and BTG distribution with 66% and 70% respectively. In fine dining, France occupies the #2 position both BTB and BTG with 50% more distribution than #3 Italy. Argentina is 4th, marginally ahead of #5 Spain.

Country	2017			2016			% Chg Listings
	# Listings	Ave. Price	% Share	# Listings	Ave. Price	% Share	
Grand Total	22127	\$120.96		20961	\$119.39		5.6%
U.S.	14274	\$114.66	64.5%	13698	\$110.50	65.3%	4.2%
France	3303	\$163.73	14.9%	3084	\$166.06	14.7%	7.1%
Italy	2130	\$117.16	9.6%	1944	\$130.49	9.3%	9.6%
Argentina	523	\$85.94	2.4%	425	\$83.03	2.0%	23.1%
Spain	530	\$95.99	2.4%	503	\$97.54	2.4%	5.4%
Australia	443	\$115.59	2.0%	423	\$125.61	2.0%	4.7%
Chile	269	\$105.29	1.2%	250	\$103.94	1.2%	7.6%
New Zealand	229	\$64.94	1.0%	260	\$68.25	1.2%	-11.9%
Germany	116	\$73.84	0.5%	81	\$67.71	0.4%	43.2%
Portugal	101	\$117.89	0.5%	124	\$143.74	0.6%	-18.5%
South Africa	105	\$79.48	0.5%	74	\$70.48	0.4%	41.9%
Other	104		0.5%	95			9.5%

BTB Distribution by Variety

Cabernet Sauvignon is preeminent both BTB and BTG, accounting for over a fifth of all listings in both segments. Pinot Noir narrowly outpaces Chardonnay BTB for the #2 spot, but Chardonnay retains its runner-up position BTG.

Variety	2017			2016			% Chg Listings
	# Listings	Ave. Price	% Share	# Listings	Ave. Price	% Share	
Grand Total	22127	\$120.96		20961	\$119.39		
Cabernet Sauvignon	5089	\$148.96	23.0%	4948	\$135.73	23.6%	2.8%
Chardonnay	2630	\$90.79	11.9%	2182	\$85.17	10.4%	20.5%
Pinot Noir	2626	\$98.22	11.9%	2501	\$93.51	11.9%	5.0%
Bordeaux Blend	2056	\$194.10	9.3%	2058	\$207.21	9.8%	-0.1%
Brut	1259	\$172.77	5.7%	1359	\$162.73	6.5%	-7.4%
Merlot	1022	\$87.50	4.6%	1146	\$85.09	5.5%	-10.8%
Red Blend	800	\$93.00	3.6%	749	\$90.06	3.6%	6.8%
Sauvignon Blanc	768	\$68.05	3.5%	638	\$72.11	3.0%	20.4%
Syrah/Shiraz	546	\$121.52	2.5%	589	\$124.68	2.8%	-7.3%
Sangiovese	527	\$104.49	2.4%	546	\$105.37	2.6%	-3.5%
Super Tuscan	496	\$156.89	2.2%	344	\$153.38	1.6%	44.2%
Rhone Blend	455	\$102.78	2.1%	344	\$93.90	1.6%	32.3%
Zinfandel	441	\$75.71	2.0%	422	\$74.63	2.0%	4.5%
Tempranillo	360	\$103.89	1.6%	314	\$104.64	1.5%	14.6%
Malbec	346	\$82.51	1.6%	296	\$80.90	1.4%	16.9%
Pinot Grigio/Gris	311	\$60.59	1.4%	279	\$59.80	1.3%	11.5%
Nebbiolo	282	\$159.61	1.3%	255	\$199.01	1.2%	10.6%
Riesling	264	\$74.57	1.2%	250	\$69.12	1.2%	5.6%
Other	1849		8.4%	1741		8.3%	6.2%

BTB Distribution by Price

Approximately 60% of BTB distribution is priced under \$100 and 40% of BTG distribution is priced under \$15/glass.

Price Segment	2017		2016		% Chg Listings
	# Listings	% Share	# Listings	% Share	
Grand Total	22127		20961		6%
\$40-\$59.99	3953	17.9%	4019	19.2%	-2%
\$60 - \$99.99	9539	43.1%	9101	43.4%	5%
\$100-\$149	4628	20.9%	4402	21.0%	5%
\$150-\$199	1871	8.5%	1535	7.3%	22%
\$200+	2136	9.7%	1904	9.1%	12%

Variety Reports BTB 2017 vs. 2016

Rhone Blend

Rhone Blends are comprised of red varieties common to the Rhone Valley and include Syrah, Grenache, Mouvedre, Cinsault among others. It is the 12th ranked variety BTB.

BTB Distribution by Country

France controls this varietal segment and posted the largest numeric growth in 2017.

Country	2017			2016			% Change
	# Listings	Ave. Price	% Share	# Listings	Ave. Price	% Share	
Rhone Blend	455	\$102.86		344	\$93.90		32%
France	328	\$107.00	72%	266	\$95.22	77%	23%
U.S.	61	\$84.34	13%	51	\$83.47	15%	20%
Australia	44	\$91.90	10%	23	\$94.00	7%	91%
Spain	22	\$103.00	5%	4	\$152.50	1%	450%

BTB Distribution by Price

The \$60-\$99.99 remains the largest BTB price segment with nearly half of this variety's distribution.

Price Segment	2017		2016		% Change
	# Listings	% Share	# Listings	% Share	
Rhone Blend	455		344		32%
\$40-\$59.99	94	21%	62	18%	52%
\$60 - \$99.99	223	49%	168	49%	33%
\$100-\$149	91	20%	97	28%	-6%
\$150-\$199	32	7%	9	3%	256%
\$200+	15	3%	8	2%	88%

BTB Distribution by Leading Producers

Rhone Blends

M. Chapoutier and Miraval share the top spot in 2017.

Producer	2017			Producer	2016	
	# Listings	Ave. Price	Rank		# Listings	Ave. Price
Rhone Blend	455	\$102.86		Rhone Blend	344	\$93.90
Chapoutier, M.	27	\$107.46	1	Chapoutier, M.	34	\$88.53
Miraval	27	\$60.25	2	D'Esclans, Chateau	31	\$64.38
Guigal, E.	20	\$93.29	3	Guigal, E.	25	\$84.89
Beaucastel, Chateau de	19	\$235.00	4	Miraval	19	\$60.22
Perrin, Famille	19	\$154.08	5	Henschke	13	\$103.00
D'Esclans, Chateau	16	\$56.50	6	Jaboulet, Paul	13	\$106.00
Nerthe, Chateau La	15	\$117.33	7	Tardieu-Laurent	13	\$63.00
Jaboulet, Paul	14	\$115.50	8	La Nerthe, Chateau	11	\$142.00
Mont-Redon, Chateau	14	\$89.43	9	Beaucastel, Chateau de	10	\$158.63
Henschke	12	\$97.00	10	Mont-Redon, Chateau	10	\$96.43
Owen Roe	12	\$89.00	11	Bonny Doon	9	\$75.00
Tardieu Laurent	12	\$60.00	12	Perrin	7	\$80.00
Orin Swift	10	\$77.57	13	Vaudieu, Chateau de	7	\$101.50
Bonny Doon	9	\$95.33	14	Coppola, Francis	6	\$61.00
D'Arenberg	8	\$105.00	15	D'Aqueria, Chateau	5	\$57.50
Vaudieu, Chateau de	8	\$112.50	16	Delas	5	\$97.00
Department 66	7	\$79.00	17	Michael David	5	\$52.00
Minuty, Chateau	7	\$58.50	18	Torbreck	5	\$126.33
Yangarra	7	\$61.00	19	Bertrand, Gerard	4	\$72.00
Beaurenard, Domaine de	6	\$175.00	20	Vieux Telegraphe, Don	4	\$145.00
Bila-Haut	6	\$75.00	21	Raspail-Ay, Domaine	3	\$70.00
Delas	6	\$119.00	22	Torres, Miguel	3	\$105.00
Murrieta's Well	6	\$52.00	23	Zaca Mesa	3	\$53.00

Part II: Luxury Wine Distribution by Country of Origin

South Africa

South Africa ranks 11th in luxury wine distribution BTB.

BTB Distribution by Variety

Bordeaux Blend is the primary variety with over 45% of BTB distribution.

Variety	2017			2016			% Change
	# Listings	Ave. Price	% Share	# Listings	Ave. Price	% Share	
South Africa	105	\$79.48		74	\$70.48		42%
Bordeaux Blend	49	\$80.75	46.7%	33	\$64.50	45%	48%
Red Blend	15	\$72.00	14.3%	10	\$65.25	14%	50%
Chardonnay	14	\$79.89	13.3%	NA			++
Chenin Blanc	10	\$70.60	9.5%	NA			++
Cabernet Sauvignon	7	\$85.80	6.7%	13	\$83.80	18%	-46%
Pinotage	1	\$59.00	1.0%	9	\$74.25	12%	-89%
Other	9		8.6%	9		12%	0%

BTB Distribution by Price

Nearly ¾ of South African BTB placements are in the \$60+ price range..

Price Segment	2017		2016		% Change
	# Listings	% Share	# Listings	% Share	
South Africa	105		27		289%
\$40-\$59.99	29	27.6%	9	33.3%	222%
\$60 - \$99.99	57	54.3%	17	63.0%	235%
\$100-\$149	19	18.1%	1	3.7%	1800%

BTB Distribution by Producer

Glen Carlou and Mulderbosch tie for the top BTB spot among South Africa's producers.

2017				2016		
Producer	# Listings	Ave. Price	Rank	Producer	# Listings	Ave. Price
South Africa	105	\$79.48		South Africa	74	\$70.48
Glen Carlou	19	\$58.33	1	Glen Carlou	21	\$56.00
Mulderbosch	19	\$59.50	2	Mulderbosch	14	\$60.50
Boekenhoutskloof	10	\$73.50	3	De Toren	9	\$76.00
De Toren	10	\$96.50	4	Fairview	5	\$55.00
Raats	9	\$81.00	5	Glenelly	5	\$60.00
Ernie Els	7	\$94.50	6	Boekenhoutskloof	2	\$81.00
De Wetshof	4	\$56.00	7	Edgebaston	2	\$135.00
Hamilton Russell	3	\$83.33	8	Hamilton Russell	2	\$80.50
Rust en Vrede	3	\$71.00	9	Kanonkop	2	\$90.00

Part III: Supplier Profiles (this excerpt is from our 2016 edition of this report)

Boisset Family Estates

Distribution by Variety

By the Bottle				2016				2014			
Variety	# Listings	Ave. Price	% Share	Producer	# Listings	Ave. Price	% Share	Variety	# Listings	Ave. Price	% Share
Boisset Family Estates	160	\$74.59		Boisset Family Estates	130	\$69.68		Boisset Family Estates	130	\$69.68	
Cabernet Sauvignon	57	\$75.00	36%	Cabernet Sauvignon	57	\$71.10	44%	Cabernet Sauvignon	57	\$71.10	44%
Pinot Noir	32	\$71.91	20%	Pinot Noir	31	\$66.89	24%	Pinot Noir	31	\$66.89	24%
Bordeaux Blend	20	\$111.00	13%	Bordeaux Blend	13	\$105.00	10%	Bordeaux Blend	13	\$105.00	10%
Red Blend	13	\$68.00	8%	Red Blend	13	\$64.00	10%	Red Blend	13	\$64.00	10%
Chardonnay	12	\$67.50	8%	Chardonnay	5	\$57.25	4%	Chardonnay	5	\$57.25	4%
Brut	9	\$62.33	6%	Brut	4	\$60.00	3%	Brut	4	\$60.00	3%
Merlot	9	\$62.75	6%	Merlot	4	\$56.33	3%	Merlot	4	\$56.33	3%
Brut Rose	4	\$59.33	3%	Nebbiolo	1	\$95.00	1%	Nebbiolo	1	\$95.00	1%
Nebbiolo	2	\$95.50	1%	Petite Sirah	1	\$74.00	1%	Petite Sirah	1	\$74.00	1%
Petite Sirah	1	\$74.00	1%	Zinfandel	1	\$50.00	1%	Zinfandel	1	\$50.00	1%
Zinfandel	1	\$52.00	1%								

By the Glass

2016				2014			
Variety	# Listings	Ave. Price	% Share	Producer	# Listings	Ave. Price	% Share
Boisset Family Estates	41	\$14.76		Boisset Family Estates	46	\$15.20	
Cabernet Sauvignon	16	\$15.08	39%	Cabernet Sauvignon	20	\$14.64	43%
Cremant	9	\$15.67	22%	Pinot Noir	9	\$19.00	20%
Pinot Noir	8	\$14.67	20%	Bordeaux Blend	6	\$14.00	13%
Brut Rose	3	\$13.00	7%	Brut	4	\$14.75	9%
Merlot	2	\$15.25	5%	Merlot	3	\$14.00	7%
Bordeaux Blend	1	\$15.50	2%	Chardonnay	2	\$13.00	4%
Chardonnay	1	\$13.50	2%	Red Blend	1	\$15.00	2%
Zinfandel	1	\$13.50	2%	Zinfandel	1	\$13.00	2%

Distribution by Producer

By the Bottle				2014			
2016				2014			
Producer	# Listings	Ave. Price	% Share	Producer	# Listings	Ave. Price	% Share
Boisset Family Estates	160	\$74.59		Boisset Family Estates	130	\$69.68	
Raymond	68	\$75.24	43%	Raymond	63	\$74.56	48%
Buena Vista	29	\$71.43	18%	Buena Vista	30	\$61.56	23%
Boisset, Jean-Claude	25	\$68.25	16%	DeLoach	24	\$56.43	18%
DeLoach	25	\$63.22	16%	Boisset, Jean-Claude	7	\$91.00	5%
Boisset	6	\$125.00	4%	JC Boisset	4	\$60.00	3%
Batasiolo, Beni di	2	\$95.50	1%	Batasiolo, Beni di	1	\$95.00	1%
Boillot, Louis	2	\$110.00	1%	Bouillot, Louis	1	\$65.00	1%
Bouchard, Aine & Fils	2	\$85.00	1%				
Mommessin	1	\$85.00	1%				

By the Glass				2014			
2016				2014			
Producer	# Listings	Ave. Price	% Share	Producer	# Listings	Ave. Price	% Share
Boisset Family Estates	41	\$14.76		Boisset Family Estates	46	\$15.20	
Boisset, Jean-Claude	18	\$14.50	44%	Raymond	23	\$14.50	50%
Raymond	18	\$15.13	44%	Buena Vista	8	\$15.00	17%
DeLoach	4	\$14.25	10%	Boisset, Jean-Claude	7	\$23.00	15%
Buena Vista	1	\$15.50	2%	DeLoach	3	\$13.33	7%
				JC Boisset	2	\$19.75	4%
				Bouillot, Louis	1	\$13.00	2%

Complete Rankings of Top 30 Producers and Suppliers 2017 vs. 2016 Are Available in Winemetrics 2017 Luxury Wine On-Premise Distribution Report