



WINEMETRICS

2017 On-Premise Wine Distribution Report

Featuring 2017-2016 Trend Analysis

Includes 2018 Supplier Rankings by Variety



WINEMETRICS

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Introduction

This is the ninth edition of **Winemetrics** *On-Premise Wine Distribution Report*. Over 90% of the wine lists used in this report were compiled from November 1, 2017 to January 31, 2018. We have again carefully matched our 2017/2016 account samples to provide extremely accurate trend analysis this year. For this report we replaced 14 chains from 2016 with more dynamic concepts, which include True Food Kitchen, BlackFinn Ameripub and Cleo. A total of 172 restaurant groups and chains were used from both 2017 and 2016 which we hope will remain relatively consistent in the future. We will, however, continually upgrade our survey list to reflect changes in on-premise trends.

Should you wish to acquire more detailed information about specific chains, wine varieties and/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 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.

Highlights from Winemetrics 2017 On-Premise Wine Distribution Report

Here are some highlights from our 2017 On-Premise Wine Distribution Report:

- Survey Profile:
 - 172 chains/restaurant groups were surveyed in both 2017 and 2016
 - 14 chains/groups from 2016 were replaced with newer concepts in 2017
 - Total units represented each year 2017: 10,202 vs. 2016: 10,360 a decline of -2%
 - Total BTG listings fell -2% and BTB listing rose +4% in 2017-2016

- Distribution Growth Leaders – Suppliers, BTG+BTB Distribution
 - E&J Gallo
 - Duckhorn
 - Deutsch Family Wine & Spirits
 - Vineyard Brands
 - Copper Cane
 - Vintus LLC
 - Maison Marques & Domaines

- Distribution Growth Leaders – Producers with robust growth in 2017 (BTB only)
 - Cupcake
 - Meiomi
 - Rocce della Macie
 - Cakebread
 - Duckhorn
 - Louis M. Martini
 - La Marca

- Countries/Regions – Regions that greatly exceeded average in 2017 (BTB only)
 - U.S./Oregon
 - France
 - Australia
 - Spain
 - South Africa

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

List of Major Restaurant Chains/Groups Used in Our 2016 Sample

99 Restaurant	Daily Grill	Landry's Seafood	Redstone Grill
Alamos Drafthouse	Del Frisco's Grille	Lazy Dog	Rock & Brews
Anthonys CF Pizza	Devon Seafood	Legal Seafood	Rock Bottom
Bagger Dave's	Dos Caminos	Logan's Roadhouse	Romano's MG
Bahama Breeze	Duke's Chowderhouse	Longhorn Steakhouse	Roy's
Bandera	Earl's	Lucille's BBQ	Ruby Tuesday
Bar Louie	Eddie Merlot's	Lucky Strike	Russo's Pizza
Benihana	Eddie V's	Maggianos	Rusty Bucket, The
Bertuccis	Elephant Bar	Marlow's Tavern	Ruth's Chris
Biaggis	Finn & Porter	Matchbox Pizza	Salt Creek Grille
BJs	Firebirds	McCormick & Schmick's	Saltgrass Steakhouse
Black Angus	Fish City Grill	Mellow Mushroom	Seasons 52
Black Finn	Fishmarket	Melting Pot, The	Sizzling Steak Concepts
Blue Sushi Sake	Flanigan's	Miller's Ale House	Smokey Bones
Bonefish Grill	Flemings	Mimi's Café	Spaghetti Warehouse
Brass Tap, The	Fox & Hound	Mitchell's	Stanford's
Bravo	Francesca's	Mon Ami Gabi	Stir Crazy
Brick House	Gordon Biersch	Morton's	Stonewood
Brio	Grand Lux	Nobu	Stoney River
Brixz Pizza	Granite City	North	Sullivan's
Bubba Gump Shrimp Co.	Grill on the Alley	Not Your Average Joes	Sushi Samba
Buca di Beppo	Grillsmith	Ocean Prime	Tahoe Joe's
Burton's Grill	Grimaldi's	Oceanaire	Ted's Bulletin
CA Pizza Kitchen	Hard Rock Café	O'Charley's	Ted's Montana Grill
Cadillac Ranch	Haru Sushi	Old Spaghetti Factory	Texas de Brazil
Cantina Laredo	Hillstone	Olive Garden	The Chophouse
Capital Grille	Hooked on Harry's	Original Roadhouse	The Palm
Carino's	Houlihan's	Outback	The Pub
Carolina Ale House	Houston's	Palomino	Thirsty Lion
Carrabba's	Il Fornaio	Pappadeaux	Tommy Bahama
Cattlemens	J. Alexanders	Pappasitos	Tony Roma's
Champps	J. Gilberts	Paul Martin's	True Food Kitchen
Chart House	Jax Fish House	Perry's Steakhouse	Truluck's
Cheddar's	Joes American	PF Changs	Uncle Julio's
Cheesecake Factory	Joe's Crab Shack	Phillips Seafood	Uno Chicago Grill
City Tap House	Joe's Seafood	Piatti	Village Tavern
Claim Jumper	Joey	Plan B Burgers	Wildfire
Cleo	Johnny's Italian Steakhse.	Punch Bowl Social	Willie G's
Coastal Flats	Katsuya	QWRH	Winberies
Copeland's	Keg Steakhouse	RA Sushi	Wood N Tap
Copper Canyon	Kincaid's	Red Lobster	Wood Ranch BBQ
Counter Burger	King's Fish House	Red Robin	Zinburger
CRAVE	Kona Grill	Redlands	Yard House

On-Premise Insights

Part I: By the Bottle (BTB) Distribution Analysis

By The Bottle (BTB) Analysis Summary

BTB Breakdown by Wine Type

All segments of BTB grew in 2017, largely due to the expansion in key fine-dining chains. Sparkling wines and Still Rose wines again led the way in 2017 with increases of +13% and +6% respectively after growing +2% and +4% in 2016. Still Red and White wines increased +4% and +3% .

Wine Type/Color	2017			2016			% CHG
	# Listings	Ave. Price	% Share	# Listings	Ave. Price	% Share	
All	38756	\$78.72		37220	\$73.36		4%
Sparkling	2295	\$118.11	5.9%	2032	\$112.71	5.5%	13%
Still	36310	\$75.90	93.7%	35044	\$70.65	94.2%	4%
Red	22443	\$88.92	57.9%	21609	\$82.83	58.1%	4%
Rose	1349	\$35.84	3.5%	1277	\$34.87	3.4%	6%
White	12518	\$53.83	32.3%	12158	\$49.59	32.7%	3%
Other	152		0.4%	144		0.4%	6%

BTB Breakdown by Country of Origin

Nearly every country's BTB distribution expanded in 2017, with Australia, France, Germany, Spain and South Africa all growing by double digits. Italy's BTB distribution was essentially flat at -0.7% and Chile had the lone deficit of -10%.

Country	2017			Country	2016			% CHG
	# Listings	Ave. Price	% Share		# Listings	Ave. Price	% Share	
All	38756	\$78.72		All	37220	\$73.36		4.1%
Argentina	1234	\$52.38	3.2%	Argentina	1214	\$46.76	3.3%	1.6%
Australia	841	\$74.74	2.2%	Australia	668	\$79.81	1.8%	25.9%
Chile	430	\$66.54	1.1%	Chile	476	\$63.17	1.3%	-9.7%
France	2879	\$131.81	7.4%	France	2368	\$133.76	6.4%	21.6%
Germany	263	\$46.25	0.7%	Germany	222	\$42.58	0.6%	18.5%
Italy	6205	\$64.67	16.0%	Italy	6249	\$63.36	16.8%	-0.7%
New Zealand	1052	\$45.18	2.7%	New Zealand	980	\$44.66	2.6%	7.3%
South Africa	220	\$58.80	0.6%	South Africa	194	\$49.09	0.5%	13.4%
Spain	774	\$69.68	2.0%	Spain	679	\$68.24	1.8%	14.0%
U.S.	24587	\$76.52	63.4%	U.S.	23962	\$69.49	64.4%	2.6%
Other	272		0.7%	Other	208		0.6%	30.8%

BTB Breakdown by Variety

Prosecco continued its spectacular growth up +44% after a +15% jump in 2016. Rhone Blends (+49%), Syrah/Shiraz (+25%) and Tempranillo (+16%) robust growth may be partially explained by their use in Rose wine. White Zinfandel (-10%), and Sangiovese (-12%) continued their decline after enduring 2016 losses of (-13%) and (-11%) respectively. Merlot (-10%) and Zinfandel (-18%) also dropped double digits as red still wines remained in positive territory with by gains by Cabernet Sauvignon (+7%) and Pinot Noir (+9%)

BTB Listings by Variety

	2017			2016			
	# Listings	Ave. Price	% Share	# Listings	Ave. Price	% Share	% CHG
Total	38756	\$78.73		37220	\$73.36		4.1%
Cabernet Sauvignon	6523	\$105.65	16.8%	6126	\$97.31	16.5%	6.5%
Chardonnay	5118	\$65.57	13.2%	4868	\$58.65	13.1%	5.1%
Pinot Noir	4062	\$70.07	10.5%	3721	\$65.59	10.0%	9.2%
Merlot	2505	\$59.16	6.5%	2782	\$54.83	7.5%	-10.0%
Pinot Grigio/Gris	2160	\$39.66	5.6%	2227	\$38.08	6.0%	-3.0%
Sauvignon Blanc	2100	\$47.95	5.4%	1917	\$48.12	5.2%	9.5%
Red Blend	1889	\$62.10	4.9%	1976	\$60.00	5.3%	-4.4%
Bordeaux Blend	1700	\$169.25	4.4%	1559	\$162.33	4.2%	9.0%
Brut	1267	\$133.41	3.3%	1267	\$128.59	3.1%	0.0%
Riesling	1163	\$41.64	3.0%	1166	\$38.89	2.8%	-0.3%
Malbec	1067	\$49.51	2.8%	1039	\$46.02	2.8%	2.7%
Moscato Bianco	991	\$31.86	2.6%	1062	\$30.07	2.9%	-6.7%
Sangiovese	902	\$68.78	2.3%	1019	\$64.14	2.7%	-11.5%
Syrah/Shiraz	709	\$81.08	1.8%	566	\$81.96	1.5%	25.3%
White Zinfandel	706	\$25.26	1.8%	788	\$24.50	2.1%	-10.4%
Super Tuscan	659	\$117.74	1.7%	519	\$100.69	1.4%	27.0%
Prosecco	648	\$38.23	1.7%	451	\$36.77	1.2%	43.7%
Zinfandel	645	\$55.51	1.7%	784	\$52.03	2.1%	-17.7%
Rhone Blend	576	\$68.57	1.5%	387	\$69.34	1.0%	48.8%
White Blend	503	\$49.47	1.3%	453	\$48.09	1.2%	11.0%
Tempranillo	413	\$78.43	1.1%	356	\$79.87	1.0%	16.0%
Corvina Blend	306	\$110.85	0.8%	267	\$91.28	0.7%	14.6%
Brut Rose	241	\$147.98	0.6%	187	\$163.59	0.5%	28.9%
Petite Sirah	211	\$57.65	0.5%	209	\$56.47	0.6%	1.0%
Other	1692		4.4%	1524		4.1%	11.0%

Top 10 Brands ByThe Bottle

(Note: Winemetrics On-Premise Wine Distribution Report lists the top 25-50 producers in most categories)

There were few changes in the top 10 BTB rankings but significant changes occurred among the rest of the top 50. Prices increased modestly across all brands in this segment.

2017				2016			
Producer	# Listings	Ave. Price	Rank	Producer	# Listings	Ave. Price	
Chateau Ste. Michelle	900	\$41.01	1	Chateau Ste. Michelle	897	\$40.73	
Beringer	869	\$58.26	2	Beringer	814	\$49.28	
Kendall-Jackson	755	\$38.76	3	Kendall-Jackson	807	\$39.58	
Coppola, Francis	561	\$42.76	4	Coppola, Francis	607	\$40.84	
Ecco Domani	552	\$27.85	5	Ecco Domani	564	\$27.67	
Cavit	498	\$27.57	6	Cavit	503	\$28.37	
La Crema	370	\$47.53	7	J. Lohr	479	\$38.30	
Cupcake	349	\$27.90	8	La Crema	421	\$46.68	
Meiomi	316	\$46.93	9	Mark West	417	\$31.37	
Mark West	313	\$31.98	10	Apothic	389	\$29.56	