



WINEMETRICS

2016 On-Premise Wine Distribution Report

Featuring 2016-2015 Trend Analysis

Includes Expanded Supplier Rankings



WINEMETRICS

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Introduction

This is the eighth edition of **Winemetrics** *On-Premise Wine Distribution Report*. Over 90% of the wine lists used in this report were compiled from September 1, 2016 to January 31, 2017. We have again carefully matched our 2016/2015 account samples to provide extremely accurate trend analysis this year. A very small percentage (3%) of declining chains were replaced with dynamic chains of the same size and type to preserve a consistent sample across both years. A total of 175 restaurant groups and chains were used from both 2016 and 2015 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.

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 via its 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 2016 On-Premise Wine Distribution Report

From September, 2016 to the end of January, 2017 we once again sampled a representative group of wine lists from 175 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 Wine List Analysis Reports.

This year we replaced approximately 3% of the chains in our survey, replacing declining and defunct chains with those of the same type and cuisine that promise future expansion.

In 2016, there was a decline in BTG listings and a slight increase in BTB listings, largely due to an slight overall increase in chain

Here are some highlights from our 2016 On-Premise Wine Distribution Report:

- Distribution Growth Leaders – Suppliers
 - E&J Gallo
 - The Wine Group
 - Treasury Wine Estates

- Distribution Growth Leaders - Producers
 - Apothic
 - Mark West
 - Meiomi
 - Joel Gott

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

List of Major Restaurant Chains/Groups Used in Our 2015 Sample

99 Restaurant	Devon Seafood	Ling & Louie's	Red Rock Canyon
American Tap Room	Dos Caminos	Logan's Roadhouse	Redstone Grill
Anthony's CF Pizza	Duke's Chowderhouse	Lone Star	RiRa
Axel's Bonfire	Eddie Merlot's	Longhorn Steakhouse	Rock Bottom
Bahama Breeze	Eddie V	Lucille's BBQ	Rockfish Grill
Bandera	Elephant Bar	Lucky Strike	Romano's MG
Bandera	Finn & Porter	Maggianos	Roy's
Bar Louie	Firebirds	Marlow's Tavern	Ruby Tuesday
Benihana	Fish City Grill	Matchbox Pizza	Russo's Pizza
Bertucci's	Fishmarket	McCormick & Schmick's	Rusty Bucket, The
Biaggis	Flanigan's	Melting Pot, The	Ruth's Chris
Big River Grille	Flemings	Miller's Ale House	Salt Creek Grille
BJs	Fox & Hound	Mimi's Café	Saltgrass Steakhouse
Black Angus	Francesca's	Mitchell's	Seasons 52
Bluewater Grill	Gordon Biersch	Mon Ami Gabi	Shaw's
Bonefish Grill	Grand Lux	Morton's	Slater's 50/50
Bravo	Granite City	Nobu	Smoky Bones
Brick House	Grillsmith	North	Spaghetti Warehouse
Brio	Grimaldi's	Not Your Average Joes	Stanford's
Brixx Pizza	Hard Rock Café	Ocean Prime	Stir Crazy
Buca di Beppo	Harry Caray's	Oceanaire	Stonewood
Burton's Grill	Haru Sushi	O'Charley's	Stoney River
CA Pizza Kitchen	Hennessey's	Old Chicago	Sullivan's
Cantina Laredo	Hillstone	Old Spaghetti Factory	Sushi Samba
Capital Grille	Hooked on Harry's	Olive Garden	Tahoe Joe's
Carino's	Houlihan's	Original Roadhouse	Ted's Montana Grill
Carolina Ale House	Houston's	Osha Thai	Texas de Brazil
Carrabbas	Il Fornaio	Outback	Texas Land & Cattle
Catch 35	J. Alexander's	Palomino	The Chophouse
Cattlemens	J. Gilberts	Papa Vino	Thirsty Lion
Champps	Jax Fish House	Pappadeaux	Timpano Chophouse
Charleston's	Joes American	Pappasito's	Tommy Bahama
Charlie Browns	Joe's Crab Shack	Perry's Steakhouse	Tony Roma's
Chart House	Joe's Seafood	PF Changs	Tripp's
Cheddar's	Joey	Phillips Seafood	Truluck's
Cheesecake Factory	Johnny's Italian Steakhouse	Piatti	Uno Chicago Grill
Chuck's Steakhouse	Keg Steakhouse	Plan B Burgers	Village Tavern
Claim Jumper	Kincaid's	Quarterdeck	Wildfire
Coal Vines Pizza	King's Fish House	QWRH	Willie G's
Copeland's	Kona Grill	RA Sushi	Wood Ranch BBQ
Copper Canyon	Landry's Seafood	Rainforest Café	Yard House
CRAVE	Lazy Dog	Ram Brewery	Zinburger
Daily Grill	Lee Roy Selmon	Red Lobster	Zios
Dave & Buster's	Legal Seafood	Red Robin	

On-Premise Insights

By The Glass (BTG) Analysis Summary

Breakdown by Wine Type

Sparkling (+4%) and Rose Still wine (+2%) posted the only increases.

By-the-Glass Distribution by Wine Type/Color

BTG Distribution by Wine Type/Color

Wine Type/Color	2016			2015			
	# Listings	Ave. Price	% Share	# Listings	Ave. Price	% Share	% Change
Grand Total	22998	\$10.47		23117	\$9.99		-1%
Sparkling	1515	\$11.54	7%	1452	\$11.25	6%	4%
Still	21408	\$10.36	93%	21579	\$9.85	93%	-1%
Red	11410	\$10.98	50%	11475	\$10.31	50%	-1%
Rose	1212	\$7.63	5%	1183	\$7.17	5%	2%
White	8792	\$9.80	38%	8921	\$9.50	39%	-1%
Other	72		0%	86	NA	0%	-16%

BTG Breakdown by Price

There seems to be a clear pattern of raising BTG prices as chains move pricing distribution from \$6-\$6.99 to \$7.99 and \$8-\$8.99 to \$9-\$9.99. Interestingly, we see growth at both ends of the spectrum in the <\$6.00 and +\$20 segments. Casual chains, struggling to increase traffic, appear to be offering more low-cost selections to their clientele whereas fine-dining chains, whose business is up in 2015, have no problem selling wines over \$20/glass.

BTG Distribution by Price Segment

Price Segment	2016			2015			
	# Listings	Ave. Price	% Share	# Listings	Ave. Price	% Share	% Change
Grand Total	22998	\$10.47		23117	\$9.99		-1%
<\$6.00	1531	\$5.47	7%	2383	\$5.41	10%	-36%
\$6-\$6.99	3291	\$6.45	14%	3620	\$6.45	16%	-9%
\$7-\$7.99	4119	\$7.46	18%	4054	\$7.38	18%	2%
\$8-\$8.99	4959	\$8.25	22%	4432	\$8.26	19%	12%
\$9-\$9.99	2574	\$9.22	11%	2590	\$9.23	11%	-1%
\$10-\$11.99	3207	\$10.57	14%	3051	\$10.58	13%	5%
\$12-\$14.99	1906	\$12.89	8%	1788	\$12.82	8%	7%
\$15-\$19.99	894	\$16.36	4%	769	\$16.20	3%	16%
\$20+	455	\$27.64	2%	371	\$25.42	2%	23%

Breakdown by Country of Origin

Australia(-21%) was the only country to lose significant share, while New Zealand and South Africa increased +23% and +19% in 2016. BTG share fell modestly in California, Washington and Spain.

By-the-Glass Distribution by Country

Country/Region	2016			2015			% Change
	# Listings	Ave. Price	% Share	# Listings	Ave. Price	% Share	
Argentina	876	\$9.51	4%	846	\$9.41	4%	4%
Australia	547	\$9.32	2%	691	\$8.99	3%	-21%
Chile	221	\$9.38	1%	208	\$9.10	1%	6%
France	428	\$14.43	2%	395	\$13.82	2%	8%
Germany	180	\$10.50	1%	181	\$9.70	1%	-1%
Italy	4758	\$9.29	21%	4824	\$9.35	21%	-1%
New Zealand	712	\$9.99	3%	579	\$9.98	3%	23%
South Africa	131	\$9.79	1%	110	\$9.96	0%	19%
Spain	274	\$10.17	1%	297	\$9.93	1%	-8%
U.S.	14759	\$10.65	64%	14876	\$9.99	64%	-1%
California	12570	\$10.86	55%	12699	\$10.14	55%	-1%
Oregon	227	\$11.94	1%	227	\$11.50	1%	0%
Washington	1934	\$8.74	8%	2031	\$8.52	9%	-5%
Grand Total	22998	\$10.47		23117	\$9.99	100%	

BTG Breakdown by Variety

Red Blends (+16%) and Prosecco (+19%) continue on their winning streak, two of the three varieties securing double-digit increases. The third, Rhone Blends, grew by virtue of the growth of French rose, which are largely made from these blends. Brut fell -14% likely a victim of Prosecco's continued popularity and affordable price. Riesling, White Zinfandel, Super Tuscan, Syrah/Shiraz and Sangiovese all fell by double digits.

BTG Distribution by Variety

Variety	2016			2015			% Change
	# Listings	Ave. Price	% Share	# Listings	Ave. Price	% Share	
Grand Total	22998	\$10.47		23117	\$9.99		-1%
Chardonnay	3354	\$10.59	15%	3304	\$10.05	14%	2%
Cabernet Sauvignon	3112	\$12.37	14%	2990	\$10.83	13%	4%
Pinot Noir	2162	\$11.29	9%	2085	\$10.87	9%	4%
Merlot	1978	\$9.27	9%	2046	\$9.12	9%	-3%
Pinot Grigio/Gris	1823	\$9.15	8%	1764	\$8.97	8%	3%
Red Blend	1437	\$10.50	6%	1240	\$10.15	5%	16%
Sauvignon Blanc	1277	\$10.12	6%	1219	\$9.89	5%	5%
Moscato Bianco	1064	\$7.97	5%	1070	\$7.87	5%	-1%
Riesling	924	\$8.96	4%	1135	\$8.42	5%	-19%
White Zinfandel	826	\$6.42	4%	973	\$6.36	4%	-15%
Malbec	816	\$9.55	4%	826	\$9.37	4%	-1%
Prosecco	716	\$9.32	3%	604	\$9.35	3%	19%
Sangiovese	527	\$9.90	2%	626	\$9.13	3%	-16%
Brut	461	\$13.11	2%	535	\$12.31	2%	-14%
Zinfandel	372	\$10.26	2%	341	\$9.78	1%	9%
White Blend	331	\$9.92	1%	325	\$9.84	1%	2%
Super Tuscan	277	\$10.80	1%	350	\$14.73	2%	-21%
Syrah/Shiraz	238	\$10.06	1%	328	\$9.49	1%	-27%
Bordeaux Blend	225	\$14.83	1%	220	\$12.60	1%	2%
Rhone Blend	145	\$10.60	1%	101	\$10.34	0%	44%
Other	933		4%	1035	NA	4%	-10%

There seems to be a clear pattern of raising BTG prices as chains move pricing distribution from <\$6.00 and \$6-\$6.99 to \$7 - \$8.99 price range. The greatest percentage growth occurred in the \$15+ range.

BTG Distribution by Price Segment

Price Segment	2016			2015			% Change
	# Listings	Ave. Price	% Share	# Listings	Ave. Price	% Share	
Grand Total	22998	\$10.47		23117	\$9.99		-1%
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\$20+	455	\$27.64	2%	371	\$25.42	2%	23%

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.

Producer	# Listings	Ave. Price	Rank	Producer	# Listings	Ave. Price
2016 BTB	38181	\$73.04		2015 BTB	37675	\$66.08
Chateau Ste. Michelle	905	\$41.16	1	Chateau Ste. Michelle	1059	\$39.44
Kendall-Jackson	817	\$38.87	2	Kendall-Jackson	795	\$38.67
Beringer	768	\$51.32	3	Beringer	775	\$48.12
Coppola, Francis	622	\$40.19	4	Coppola, Francis	594	\$39.48
Ecco Domani	600	\$27.52	5	Ecco Domani	592	\$26.88
Cavit	502	\$27.73	6	Sutter Home	486	\$20.56
J. Lohr	449	\$41.61	7	Cavit	485	\$26.36
La Crema	385	\$47.32	8	J. Lohr	424	\$36.61
Mark West	357	\$31.06	9	La Crema	368	\$46.95
Cupcake	347	\$27.95	10	Rocca delle Macie	368	\$48.64