



WINEMETRICS

2013 Supplier Report

Wine Distribution Report



WINEMETRICS

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39	\$40-\$60	100-101	Kobrand		
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		106-107	Merryvale		
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Introduction

Welcome to our third edition of **Winemetrics' On-Premise Supplier Report**. This is our third consecutive report focusing on the entire supplier portfolio on-premise as our previous reports have all focused on individual brand performance. By providing composite data by supplier versus just brand, we reveal the 'portfolio power' of the nation's top 50 wine marketers.

Our report provides detailed supplier distribution information by account type (e.g. Casual Dining-American), variety and price segment. It also provides a breakdown of each of the top 50 suppliers by leading brands, varieties and price segments. Distribution information is compiled and organized both by-the-glass (BTG) and by-the-bottle (BTB). While we assume our clients probably have superior information regarding their own brands' distribution on-premise, we doubt any other source can match the level of competitive information offered in Winemetrics' 2013 On-Premise Supplier Distribution Report.

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. Note that our supplier example below lists data from V2 Wine Group, a supplier that was ranked 50th in our supplier list in combined by-the-bottle (BTB) and by-the-glass distribution.

Charles Gill
Founder & CEO
Winemetrics LLC
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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 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.

In addition to our new On-Premise Supplier Distribution Report, we also publish an annual *On-Premise Wine Distribution Report* as well as an *On-Premise Chain Accounts Report*, which will profile over 150 chain and multi-concept restaurant groups in the 2011 edition. It will also include, for the first time, fine-dining chains and share of distribution by supplier. Winemetrics' 2011 On-Premise Chain Accounts Report will be an essential tool in the marketing arsenal of any wine brand steward or national accounts sales executive. For more details on this report and to download an excerpt, please visit our site at www.winemetrics.com where you may sign up for our newsletter, *What's on America's Wine Lists*.

For the restaurant trade, Winemetrics creates custom Wine List Analysis Reports, which compare a client's list to key national and regional competitors by restaurant cuisine and type (Casual, Upscale Casual, Fine Dining). These reports feature analysis by country and appellation, variety, price and brand, allowing clients to determine if their lists provide the diversity and value needed to attract and retain high-value, core wine consumers. For more information, or to view a sample restaurant wine list analysis report, please visit our site at www.winemetrics.com and click on "Restaurants." or email us at info@winemetrics.com with your inquiries.

About Our 2013 On-Premise Supplier Distribution Report

Our supplier portfolio data was updated continuously during 2013, largely from supplier websites. This laborious task of matching thousands of brands to hundreds of suppliers was then applied to the data compiled from the sample we used for our 2013 On-Premise Report. Based on our experience on the timing and changes in wine list data, we believe this report portrays an accurate picture of supplier distribution in 2013.

Winemetrics surveys a representative group of wine lists from over 170 national and regional chains and restaurant groups. This account sample represents approximately 9000 restaurants nationwide and provides a very real picture of the wines being ordered and consumed on-premise.

A list of the major national and regional chains and restaurant groups sampled in our report 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 tables will be labeled *BTB* or *BTG* to indicate the source of the data. Please note that certain suppliers represent such a multitude of brands that those with the least distribution may not have been included in their supplier BTB/BTG Distribution Summary. However, that information can be provided in Excel reports upon request.

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List of Major Restaurant Chains/Groups Used in Our Sample

99 Restaurant	Copelands	King's Fish House	Red Hot & Blue
Anthony's CF Pizza	Crave	Kona Grill	Red Lobster
Axel's Bonfire	Daily Grill	Landry's Seafood	Red Robin
Bahama Breeze	Dave & Buster's	Lazy Dog	Red Rock Canyon
Balans	Dos Caminos	Lee Roy Selmon	Redstone Grill
Bandera	Duffy's Sports Grill	Legal Seafood	Rockbottom
Bar Louie	Duke's Chowderhouse	Logan's Roadhouse	Rockfish Grill
Benihana	Eddie Merlot's	Longhorn Steakhouse	Romano's MG
Bertucci's	Eddie V's	Louises Trattoria	Roy's
Biaggis	Elephant & Castle	Lucille's BBQ	Ruby Tuesday
Big River Grille	Elephant Bar	Maggianos	Russo's NY Pizzeria
Bill's Bar & Burger	Famous Daves	Market Broiler	Ruth's Chris
BJs	Firebirds	Marlow's Tavern	Salt Creek Grille
Black Angus	Fishmarket	Marmalade Café	Saltgrass Steakhouse
Black Finn	Flanigan's	McCormick & Schmick's	Seasons 52
Bluewater Grill	Flemings	Miller's Ale House	Shaw's
Bonefish Grill	Fogo de Chao	Mimi's Café	Shulas
Brass Tap, The	Fox's	Mitchell's	Smokey Bones
Bravo	Gordon Biersch	Mon Ami Gabi	Spaghetti Warehouse
Brick House	Grand Lux	Morton's	Spencer's
Brio	Granite City	Nobu	Splitsville
Brixx Pizza	Green Mill	North	Stanford's
Bubba Gump Shrimp	Grillsmith	Not Your Average Joes	Stir Crazy
Buca di Beppo	Grimaldi's	Ocean Prime	Stonewood
Bugaboo Creek	Hard Rock Café	Oceanaire	Stoney River
Burton's Grill	Harry Carry's	O'Charley's	Sushi Samba
CA Pizza Kitchen	Hennessey's	Old Spaghetti Factory	Tahoe Joe's
Cantina Laredo	Hillstone	Olive Garden	Ted's Montana Grill
Canyons	Hooked on Harrys	Original Roadhouse	Texas Land & Cattle
Capital Grille	Houlihan's	Outback	The Chophouse
Carino's	House of Blues	Palomino	Tommy Bahama
Carolina Ale House	Houston's	Papa Razzi	Tony Roma's
Carrabbas	Il Fornaio	Pappadeaux	Tripps
Catch 35	In the Raw	Pappa's Seafood	Truluck's
Cattlemens	Islamorada	Pasta Pomodoro	Uno Chicago Grill
Champ's	Islands Burgers	PF Changs	Village Tavern
Charleston's	J. Alexanders	Phillips Seafood	Weber Grill
Charlie Browns	J. Gilberts	Piatti	Wildfire
Chart House	Joes American	Plan B Burgers	Willie G's
Cheddar's	Joe's Crab	Quarterdeck	Winberies
Cheesecake Factory	Joe's Crab Shack	QWRH	Wolfgang Puck
Chin Chin	Joey	RA Sushi	Wood N Tap
Chuck's Steakhouse	Johnny's Italian Stkhse	Rainforest Café	Wood Ranch BBQ
Claim Jumper	Keg Steakhouse	Ram Brewery	Yard House
Coal Vine Pizza	Kincaid's	Real Seafood	Z Tejas
			Zios

Report Excerpts

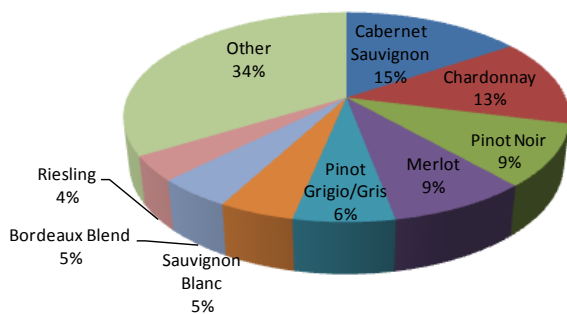
Top 25 Suppliers by BTB Distribution

Rank	Supplier	# Listings	Ave. Price
1	Constellation Brands	4039	\$45.18
2	E&J Gallo	2653	\$34.10
3	Ste. Michelle Wine Estates	2614	\$50.96
4	Treasury Wine Estates	2091	\$49.98
5	Terlato	1572	\$65.70
6	Trinchero	1536	\$31.50
7	Jackson Family Wines	1294	\$46.90
8	Palm Bay International	1153	\$51.97
9	Kobrand	853	\$77.59
10	Banfi Vintners	755	\$41.86
11	Moet-Hennessy USA	671	\$115.71
12	Diageo	642	\$48.06
13	Pernod Ricard	574	\$65.16
14	Caymus	502	\$81.38
15	DFV	481	\$31.25
16	Francis Coppola	439	\$53.53
17	J. Lohr	420	\$35.76
18	Foley Family	402	\$59.92
19	Terroir Selections	393	\$49.69
20	Winebow	366	\$50.46
21	Zonin USA	349	\$29.80
22	Brown Forman	337	\$47.13
23	Duckhorn	300	\$82.25
24	Deutsch Family Wine & Spirits	275	\$40.52
25	Huneus Vintners	260	\$116.01

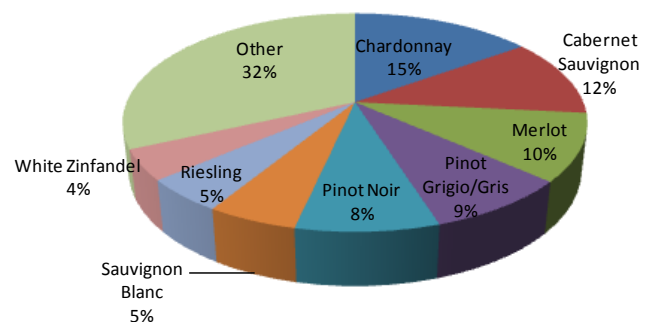
Top 25 Suppliers by BTG Distribution

Rank	Supplier	# Listings	Ave. Price
1	Constellation Brands	3131	\$8.53
2	E&J Gallo	2480	\$7.79
3	Ste. Michelle Wine Estates	1894	\$8.71
4	Treasury Wine Estates	1619	\$7.46
5	Trinchero	1484	\$7.64
6	Jackson Family Wines	906	\$10.11
7	Palm Bay International	830	\$8.68
8	Terlato	781	\$11.13
9	Banfi Vintners	578	\$7.83
10	Terroir Selections	507	\$8.75
11	Zonin USA	452	\$8.57
12	Pernod Ricard	442	\$8.69
13	DFV	408	\$7.71
14	Francis Coppola	366	\$9.77
15	Diageo	325	\$8.31
16	Brown Forman	321	\$10.86
17	J. Lohr	278	\$8.83
18	Winebow	276	\$9.32
19	Foley Family	225	\$8.23
20	Caymus	202	\$12.20
21	Fetzer Group	182	\$7.40
22	Folio	173	\$10.16
23	Kobrand	173	\$10.62
24	Rodney Strong	165	\$8.94
25	The Wine Group	160	\$7.58

Supplier BTB Distribution by Variety



Supplier BTG Distribution by Variety



Report Excerpts - Continued
Top Suppliers by Variety

Top 15 Suppliers in BTB Distribution:
 Riesling

Rank	Supplier	# Listings	Ave. Price
	Riesling	1438	\$32.52
1	Ste. Michelle Wine Estat	900	\$28.41
2	Palm Bay International	97	\$43.15
3	Loosen Bros. USA	47	\$39.04
4	Banfi Vintners	33	\$31.09
5	Constellation Brands	32	\$35.09
6	Schmitt-Sohne Inc.	28	\$35.25
7	Charles Smith	25	\$33.20
8	Wente	22	\$29.68
9	Treasury Wine Estates	19	\$51.71
10	J. Lohr	15	\$30.67
11	E&J Gallo	13	\$26.23
12	Francis Coppola	12	\$36.00
13	Kiona	10	\$29.00
14	M. Skurnik	10	\$66.00
15	Foley Family	7	\$30.86
16	Rudi Wiest	7	\$51.00
17	Trefethen	7	\$41.57

Top 10 Suppliers in BTG Distribution:
 Riesling

Rank	Supplier	# Listings	Ave. Price
	Riesling	1098	\$7.40
1	Ste. Michelle Wine f	817	\$6.97
2	Palm Bay Internatioi	44	\$9.75
3	Schmitt-Sohne Inc.	24	\$8.38
4	Banfi Vintners	23	\$7.58
5	Constellation Brand:	23	\$7.73
6	Loosen Bros. USA	21	\$9.17
7	Charles Smith	19	\$8.00
8	Wente	12	\$6.88
9	E&J Gallo	11	\$6.95
10	J. Lohr	11	\$8.36

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Report Excerpts – Continued
Top Suppliers by Price Segment

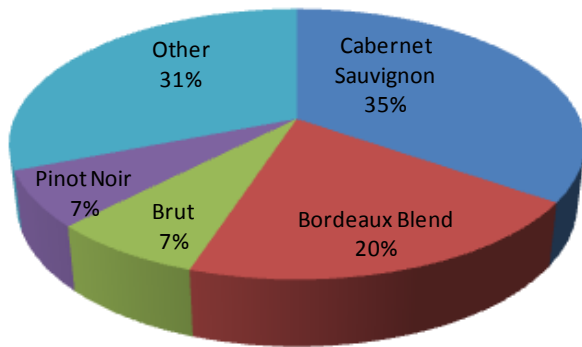
**Top 10 Suppliers in the \$100+
 BTB Segment**

Rank	Supplier	# Listings	Ave. Price
	\$100+	4544	\$193.58
1	Moet-Hennessy USA	275	\$237.67
2	Kobrand	224	\$155.46
3	Ste. Michelle Wine Est	201	\$148.87
4	Terlato	166	\$145.01
5	Caymus	158	\$165.04
6	Far Niente	152	\$161.43
7	Palm Bay International	152	\$125.82
8	Treasury Wine Estates	152	\$174.15
9	Silver Oak	136	\$162.28
10	Constellation Brands	135	\$136.85

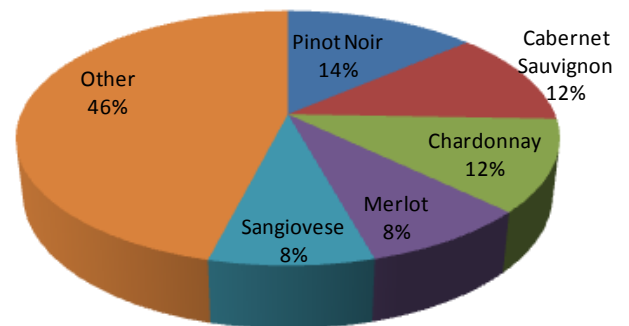
**Top Suppliers in the \$10-\$11.99
 BTG Segment**

Rank	Supplier	# Listings	Ave. Price
	\$10-\$11.99	2178	\$10.77
1	Constellation Brands	251	\$10.80
2	Jackson Family Wines	191	\$10.77
3	Ste. Michelle Wine Esta	139	\$10.64
4	Terlato	118	\$10.89
5	Pernod Ricard	114	\$11.87
6	Francis Coppola	110	\$10.97
7	Folio	76	\$10.30
8	E&J Gallo	74	\$10.51
9	Kobrand	66	\$10.76
10	Palm Bay International	66	\$10.77

Variety Distribution: \$100+ BTB



Variety Distribution: \$10-\$11.99 BTG



Report Excerpts – Continued

Supplier Summary:

By the Bottle Distribution

V2 Wine Group

Overall Rank – 50th

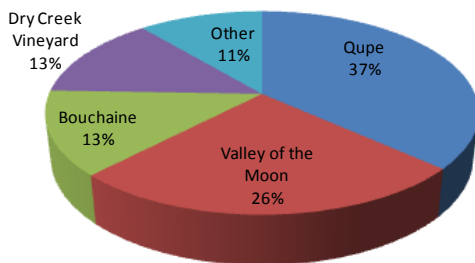
Chains with Distribution - 23

BTB Profile – Rank 53

BTB Distribution by Brand

Brand	# Listings	Ave. Price
V2 Wine Group	90	\$46.26
Qupe	33	\$46.73
Valley of the Moon	23	\$48.00
Bouchaine	12	\$46.33
Dry Creek Vineyard	12	\$42.14
Other	10	
Torbreck	5	\$50.50
Quivira	4	\$53.25
Toad Hollow	1	\$28.00

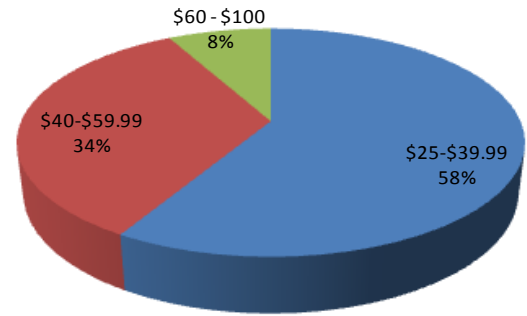
V2 Wine Group BTB Distribution by Brand



BTB Distribution by Price

Price Segment	# Listings	Ave. Price
V2 Wine Group	90	\$46.26
<\$25.00	1	\$24.95
\$25-\$39.99	52	\$30.45
\$40-\$59.99	30	\$48.24
\$60 - \$100	7	\$78.60

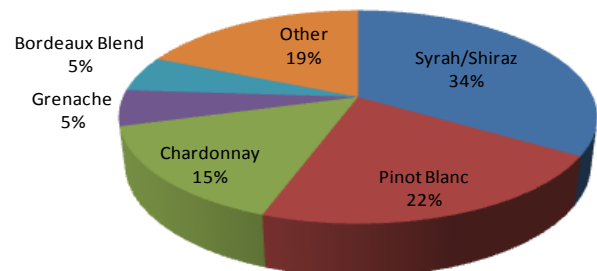
V2 Wine Group BTB Distribution by Price



BTB Distribution by Variety

Variety	# Listings	Ave. Price
V2 Wine Group	88	\$46.26
Syrah/Shiraz	31	\$41.56
Pinot Blanc	20	\$26.00
Chardonnay	14	\$48.11
Grenache	5	\$50.50
Bordeaux Blend	5	\$86.00
Other	17	
Chenin Blanc	4	\$29.48
Merlot	3	\$45.00
Pinot Noir	3	\$45.00
Sauvignon Blanc	3	\$37.67
Zinfandel	3	\$52.67
Cabernet Sauvignon	1	\$88.00

V2 Wine Group BTB Distribution by Variety



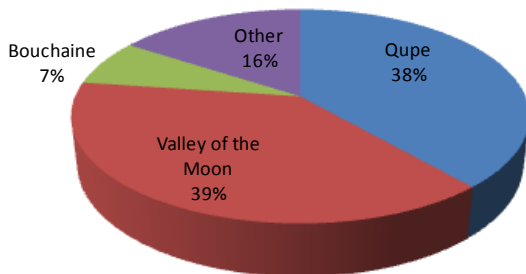
V2 Wine Group By the Glass Distribution

BTG Profile – Rank 40

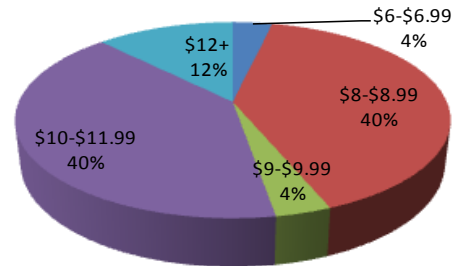
BTG Distribution by Brand

Brand	# Listings	Ave. Price
V2 Wine Group	57	\$11.04
Qupe	22	\$10.33
Valley of the Moon	22	\$8.00
Bouchaine	4	\$12.17
Other	9	
Quivira	3	\$13.17
Dry Creek Vineyard	3	\$11.73
Steelhead	1	\$9.25
Toad Hollow	1	\$9.25
Torbreck	1	\$11.00

V2 Wine Group BTG Distribution by Brand



V2 Wine Group BTG Distribution by Price



BTG Distribution by Variety

Variety	# Listings	Ave. Price
V2 Wine Group	57	\$11.04
Syrah/Shiraz	22	\$10.33
Pinot Blanc	20	\$8.00
Chardonnay	7	\$10.75
Zinfandel	3	\$13.17
Other	5	
Cabernet Sauvignon	1	\$22.00
Chenin Blanc	1	\$6.25
Grenache	1	\$11.00
Pinot Noir	1	\$9.25
Sauvignon Blanc	1	\$6.95

BTG Distribution by Price

Price Segment	# Listings	Ave. Price
V2 Wine Group	57	\$11.04
\$6-\$6.99	2	\$6.60
\$8-\$8.99	23	\$8.17
\$9-\$9.99	2	\$9.25
\$10-\$11.99	23	\$10.50
\$12+	7	\$14.92

V2 Wine Group BTG Distribution by Variety

