



WINEMETRICS

2015 Fine Dining Wine Distribution Report

Featuring 2015-2014 Trend Analysis

Includes Wine Equity Quotient Analysis and
Supplier Rankings



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Introduction

This is the second edition of *Winemetrics' Fine Dining Wine Distribution Report*. The wine lists used in this report were compiled in Q4 of 2015 with new list data added and updated in the first months of 2016. Over 120 fine-dining and select upscale casual-dining chains and restaurant groups, representing over 2,500 accounts nationwide, were surveyed for this report. In many of the larger restaurant groups we have surveyed multiple chains. As with all of our reports, we limit our survey to lists with fewer than 500 wines by the 750 ml. bottle so as to prevent accounts with vast wine selections from skewing our data.

This year's report features 2015-2014 trend analysis for brands, suppliers, varieties, country of origin and pricing as our 2015 account base is nearly identical to that of 2014. This report also includes Winemetrics' Wine Equity Quotient© ranking of brands by variety which provides an accurate, quantitative measure of on-premise brand equity. Our *2015 Fine Dining Wine Distribution Report* also includes supplier rankings by variety for both by-the-glass and by-the-bottle distribution.

Please note that this excerpt was extracted from 2015 data that was not completely updated. Data appearing in this excerpt may differ from the content in the final report.

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.

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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.

List of Major Restaurant Chains/Groups Used in the 2015 Fine Dining Survey

Ark Management	Harry Caray's	Patina Restaurant Group
Back Bay RG	Hillstone Restaurants	Jean-Georges RG
BLT Steak	Hugo's Frog Bar	Perry's Steakhouse
Bluewater Grill	Hyde Park Steakhouse	PF Changs
Bonefish Grill	Il Fornaio	Piatti
BR Guest	J. Alexanders	PJ Clarkes
Bravo Brio RG	J. Gilberts	Quaintance Weaver
Buckhead Life RG	Jax Fish House	RA Sushi
Burton's Grill	Jimmy's American Tavern	Reata
Cameron-Mitchell	Joe's Seafood	Redstone Grill
Capital Grille	Joe's Stone Crab - Miami	Restaurants Unlimited
Catch 35	Joey	Roots Steakhouse
Chart House	Johnny's Italian Steakhouse	Rosa Mexicano
Chuck's Steakhouse	Keg Steakhouse	Roy's
Clyde's Restaurant Group	Kent Rathbun RG	Ruth's Chris
Cordua Restaurants	Kimpton Restaurants	Salt Creek Grille
Crave	Kincaid's	Schwartz Bros.
Del Frisco's Grill	King's Fish House	Seasons 52
Devon Seafood	Kona Grill	Select Restaurant Group
District Chophouse	Landry's Seafood	Shula's
Donovan's Steakhouse	Legal Seafood	Smith & Wollensky's
Eddie Merlot's	LEYE	Spice Market
Eddie V's	Maggianos	Starr Restaurant Group
El Gaucho	Marlow's Tavern	Stefani Restaurant Group
Finn & Porter	Mastro's	Stonewood Grill
Firebirds Grill	McCormick & Schmick's	Strategic Hospitality - Tao
Fishmarket	Melting Pot, The	Striphouse
Flemings	Mike Ditka's	Sullivans
Fogo de Chao	Newport Restaurant Group	Sushi Samba
Fourth Wall Restaurants	Morton's	Tavistock
Francesca's	Nobu	The Chophouse
Gibson's Steakhouse	Not Your Average Joes	The Prime Rib
Grand Central Oyster Bar	Ocean Prime	Think Food Group
Grand Lux	Oceanaire	Truluck's
Great American Restaurants	Old Ebbitt Grill	Union Square Hospitality
Grill on the Alley	Palomino	Village Tavern
Grillsmith	Papa Razzi	Willie G's
Grimaldi's	Pappas Bros. RG	Wolfgang Puck Restaurants
Harris Inn & Ranch	Passion Food Group	

Part I: By the Bottle (BTB) Distribution Analysis

By the Glass (BTG) and By the Bottle (BTB) Listings 2015-2014

Both BTG and BTB listings fell by -1.6% and -3.2% respectively in 2015. Average BTG and BTB pricing both fell slightly.

2015-14 Overview	2015	2014	% Change
Total BTG Listings	8896	9041	-1.6%
Ave. Price BTG	\$11.70	\$11.67	0.2%
Total BTB Listings	29084	30032	-3.2%
Ave. Price BTB	\$90.25	\$90.00	0.3%

By The Bottle (BTB) Analysis Summary

2015-2104 Comparison by Wine Type

Distribution by wine type changed little in 2015. Red still wines edged up slightly and rose listings declined by nearly 2%.

BTB byType	2015		2014		% CHG Share
	# BTB Listings	% Share	# BTB Listings	% Share	
Still	27038	93.0%	27916	92.9%	0.1%
Red, Still	18626	64.0%	19212	63.9%	0.2%
Rose, Still	349	1.2%	367	1.2%	-1.7%
White, Still	8063	27.7%	8335	27.7%	0.0%
Sparkling	1924	6.6%	1988	6.6%	0.0%
Dessert	70	0.2%	75	0.2%	-3.6%
Fortified	52	0.2%	52	0.2%	3.3%
Total	29084		30032		

Breakdown by Country of Origin

While overall listings fell 3%, several regions increased share. France, Italy, Chile, Germany and Argentina improved share while Australia, New Zealand and South Africa declined in distribution.

Country/Region	2015		2014		% CHG Share
	# BTB Listings	% Share	# BTB Listings	% Share	
U.S.	18179	62.5%	18795	62.6%	-0.1%
California	15819	54.4%	16412	54.6%	-0.5%
Oregon	886	3.0%	921	3.1%	-0.7%
Washington	1335	4.6%	1358	4.5%	1.5%
Other	139	0.5%	137	0.5%	4.8%
France	3255	11.2%	3339	11.1%	0.7%
Italy	3231	11.1%	3290	11.0%	1.4%
Argentina	997	3.4%	1016	3.4%	1.3%
Spain	864	3.0%	891	3.0%	0.1%
Australia	710	2.4%	745	2.5%	-1.6%
New Zealand	585	2.0%	611	2.0%	-1.1%
Chile	567	1.9%	573	1.9%	2.2%
Germany	271	0.9%	274	0.9%	2.1%
South Africa	134	0.5%	141	0.5%	-1.9%
Austria	115	0.4%	124	0.4%	-4.2%
Portugal	93	0.3%	95	0.3%	1.1%
Other	83	0.3%	138	0.5%	-37.9%
Total	29084		30032		-3.2%

BTB Breakdown by Variety

No varieties posted an overall gain in distribution, but Pinot Noir, Merlot, Riesling, Sangiovese and Rhone Blend all achieved very modest increases in share.

Variety	2015		2014		% CHG Share
	# BTB Listings	% Share	# BTB Listings	% Share	
Cabernet Sauvignon	5383	18.5%	5584	18.6%	-0.5%
Chardonnay	3441	11.8%	3557	11.8%	-0.1%
Pinot Noir	3019	10.4%	3104	10.3%	0.4%
Bordeaux Blend	2050	7.0%	2113	7.0%	0.2%
Merlot	1818	6.3%	1855	6.2%	1.2%
Sauvignon Blanc	1432	4.9%	1494	5.0%	-1.0%
Brut	1382	4.8%	1433	4.8%	-0.4%
Pinot Grigio/Gris	938	3.2%	965	3.2%	0.4%
Syrah/Shiraz	862	3.0%	907	3.0%	-1.9%
Red Blend	839	2.9%	863	2.9%	0.4%
Zinfandel	756	2.6%	784	2.6%	-0.4%
Riesling	747	2.6%	762	2.5%	1.2%
Malbec	731	2.5%	749	2.5%	0.8%
Sangiovese	680	2.3%	695	2.3%	1.0%
Rhone Blend	442	1.5%	451	1.5%	1.2%
Other	4564	15.7%	4716	15.7%	-0.1%

BTB Breakdown by Price

The strongest area of growth in 2015 was in the range at or above \$150/bottle. A small increase in share also occurred in the \$25-\$39.99 segment.

Price Segment	2015		2014		% CHG Share
	# BTB Listings	% Share	# BTB Listings	% Share	
<\$25.00	571	2.0%	590	2.0%	-0.1%
\$25-\$39.99	5867	20.2%	5984	19.9%	1.2%
\$40-\$59.99	7402	25.5%	7720	25.7%	-1.0%
\$60 - \$99.99	8266	28.4%	8552	28.5%	-0.2%
\$100-\$149	3831	13.2%	4005	13.3%	-1.2%
\$150-\$199	1425	4.9%	1452	4.8%	1.3%
\$200+	1613	5.5%	1655	5.5%	0.6%

Supplier Supplement Excerpt

(Note: Winemetrics' Fine-Dining Wine Distribution Report lists the top 25-50 producers in most categories)

Constellation Brands remains the leading supplier in our fine dining universe followed very closely by Ste. Michelle Wine Estates. Treasury Wine Estates moves up to #3 after absorbing the Diageo wine portfolio.

2015				2014		
Supplier	# BTB	% Share	Rank	Supplier	# BTB	% Share
Constellation Brands	1690	5.8%	1	Constellation Brands	1595	5.3%
Ste. Michelle Wine Estates	1530	5.3%	2	Ste. Michelle Wine Estates	1563	5.2%
Treasury Wine Estates	1411	4.9%	3	Terlato	1190	4.0%
Kobrand	1183	4.1%	4	Kobrand	1234	4.1%
Terlato	1140	3.9%	5	Treasury Wine Estates	1063	3.5%
Moet-Hennessy USA	962	3.3%	7	E&J Gallo	719	2.4%
Jackson Family Wines	851	2.9%	8	Jackson Family Wines	848	2.8%
Palm Bay International	701	2.4%	9	Moet-Hennessy USA	960	3.2%
E&J Gallo	699	2.4%	10	Palm Bay International	734	2.4%