



WINEMETRICS

2018-19 Fine Dining Wine Distribution Report

Featuring 2018/19-2017 Trend Analysis

Includes 2019 Supplier Rankings by Variety



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Introduction

This is the fourth edition of *Winemetrics' Fine Dining Wine Distribution Report*. The wine lists used in this report were compiled in Q4 of 2018 with new list data added and up-dated in the first 6 months of 2018. Over 125 fine-dining and select upscale casual-dining chains and restaurant groups, representing over 2,200 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 prevent accounts with vast wine selections from skewing our data.

This year's report features 2018-2017 trend analysis for brands, suppliers, varieties, country of origin and pricing. Our 2018 account base is nearly identical to that of 2017. Both reports survey 126 chains, restaurant groups and high-profile independents. Approximately 4% of the chains/groups surveyed in 2017 were substituted with more dynamic, wine-oriented chains/groups in 2018.

Our *2018/19 Fine Dining Wine Distribution Report* also includes supplier rankings by variety based on current 2019 portfolio content. **The most recent brand acquisitions and departures from the top 100 suppliers, as of October, 2018 have been included in this report.**

Producers that fared particularly well in 2018/19 include (in no particular order): Meiomi, J. Lohr, La Crema, Decoy, Robert Mondavi, The Prisoner Wine Co., Belle Glos and Daou.

Should you wish to acquire more detailed information about specific 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.

List of Major Restaurant Chains/Groups Used in the 2018-19 Fine Dining Survey

110 Grill	Haru Sushi	Piatti
Ark Managemet	Hillstone Group	Pinstripes
Back Bay Restaurant Group	Hugo's Frog Bar & Chophouse	Quaintance-Weaver
Biaggis	Hyde Park Steakhouse	Reata
Big Red F Rest. Group	Il Fornaio	Redstone Grill
Blue Sushi Sake	J. Alexander's Holdings	Restaurants Unlimited
Bluewater Grill	J. Gilberts	Roots Steakhouse
Bonefish Grill	Jean-George rest. Group	Roy's
BR Guest	Jimmy's Famous American Tavern	Russo's Pizza
Bravo Brio Rest. Group	Joe's Seafood	Rusty Scupper
Buckhead Life Rest. Group	Joey	Ruth's Chris
Burton's Grill	Johnny's Italian Steakhouse	Salt Creek Grille
Cameron-Mitchell's	Katsuya	SBE Hospitality Group
Capital Grille	Keg Steakhouse	Schwartz Bros.
Catch 35	Kent Rathbun Rest. Group	Seasons 52
Chamberlain's	Kimpton Group	Select Rest. Group
Chart House	King's Fish House	Shaw's
Cleo	Kona Grill	Shula's
Clyde's	Landry's Seafood	Sizzling Steak Concepts
Coastal Flats	Legal Seafood	Smith & Wollensky
Copper Canyon	LEYE	Starr Rest. Group
Cordua Rest. Group	Maggianos	Stefani Rest. Group
CRAVE	Mastro's	Stonewood
Del Frisco's Grille	Matchbox	Sullivan's
Devon Seafood	McCormick & Schmick's	Sushi Samba
District Chophouse	Michael Mina Group	Tao Group
Earl's	Mike Ditka's Steakhouse	Texas de Brazil
Eddie Merlot's	Morton's	The Chophouse
Eddie V's	Newport Rest. Group	The Melting Pot
Esquared Hospitality	Nobu	The Palm
Fire & Vine Hospitality	Ocean Prime	The Prime Rib
Firebirds	Oceanaire	The Smith
Flemings	Old Ebbitt Grill	Tommy Bahama's
Fogo de Chao	Paddlefish	Truluck's
Francesca's	Pappa's Restaurants	Turnkey Hospitality Group
GCT Oyster Bar	Passionfish	Village Tavern
Gibson's Bar &Steakhouse	Patina Group	Willie G's
Grill Concepts	Paul Martin's	Wolfgang Puck Rest. Group
Grimaldi's	Perry's Steakhouse	
Harris Ranch Inn	PF Changs	

Part I: By the Bottle (BTB) Distribution Analysis (Excerpt)

By the Glass (BTG) and By the Bottle (BTB) Listings 2018/19-2017

BTB listings (+1%) achieved minimal growth, while BTG listings fell by a similar amount in 2018. Much of this growth can be attributed to the implementation of Coravin systems in leading fine dining chains. This is substantiated by a nearly +30% increase in BTG listings priced in the \$20+ segment.

Sample	2018-19		2017		Listings	Ave Price
	# Listings	Ave. Price	# Listings	Ave. Price	% CHG	% CHG
Total BTB	30801	104.35	30444	98.39	1.2%	6.1%
Total BTG	9309	13.61	9464	13.38	-1.6%	1.7%

By The Bottle (BTB) Analysis Summary

2018-2017 Comparison by Wine Type

Still rose and sparkling rose accounted for most of the growth BTB in 2018/19. White Sparkling (+4%) wines also secured moderate growth. Dessert and Fortified wines achieved double digit expansion on relatively small bases.

Type/Color	2018			2017			
	# Listings	Ave. Price	% Share	# Listings	Ave. Price	% Share	% CHG
Dessert	54	\$99.73	0.2%	47	\$73.91	0.2%	14.9%
Fortified	161	\$125.32	0.5%	125	\$102.74	0.4%	28.8%
Sparkling	2115	\$142.53	6.9%	2026	\$141.08	6.7%	4.4%
Red	24	\$64.67	0.1%	31	\$45.57	0.1%	-22.6%
Rose	345	\$147.35	1.1%	314	\$154.39	1.0%	9.9%
White	1746	\$141.75	5.7%	1681	\$139.03	5.5%	3.9%
Still	28471	\$101.67	92.4%	28246	\$95.24	92.8%	0.8%
Red	19543	\$119.57	63.4%	19469	\$111.05	64.0%	0.4%
Rose	669	\$45.54	2.2%	501	\$45.40	1.6%	33.5%
White	8259	\$65.49	26.8%	8276	\$62.90	27.2%	-0.2%
Grand Total	30801	\$104.55	100.0%	30444	\$98.39		1.2%

Breakdown by Country of Origin

Of the leading regions, France again grew nearly 10% based on demand for both still and sparkling rose. New Zealand (+7%) and Portugal (+20%) also managed to expand distribution in this year of relatively flat growth.

Country	2018			2017			Listings
	# Listings	Ave. Price	% Share	# Listings	Ave. Price	% Share	% CHG
U.S.	18949	\$103.23	61.5%	18893	\$96.47	62.1%	0.3%
France	4082	\$149.52	13.3%	3725	\$145.56	12.2%	9.6%
Italy	3297	\$87.67	10.7%	3246	\$84.79	10.7%	1.6%
Argentina	1031	\$65.53	3.3%	1053	\$62.74	3.0%	-2.1%
Spain	934	\$81.52	3.0%	915	\$73.57	3.5%	2.1%
Australia	685	\$91.47	2.2%	700	\$85.82	2.3%	-2.1%
New Zealand	618	\$53.92	2.0%	580	\$50.25	1.9%	6.6%
Chile	364	\$75.11	1.2%	519	\$71.84	1.7%	-29.9%
Germany	265	\$52.90	0.9%	285	\$55.71	0.9%	-7.0%
Portugal	176	\$98.33	0.6%	147	\$86.49	0.5%	19.7%
South Africa	164	\$59.65	0.5%	175	\$60.46	0.6%	-6.3%
Other	236		0.8%	206		0.7%	14.6%

BTB Breakdown by Variety

Rhone Blends (+18%), a major component of French rose wines, and Red Blends (+13%) both expanded by double digits. Brut (+4%), Chardonnay (+3%) and Cabernet Sauvignon (+2%) achieved moderate gains.

Variety	2018			2017			Listings
	# Listings	Ave. Price	% Share	# Listings	Ave. Price	% Share	% CHG
Cabernet Sauvignon	5880	\$148.03	19.1%	5756	\$135.05	18.9%	2.2%
Chardonnay	3723	\$77.64	12.1%	3599	\$77.09	11.8%	3.4%
Pinot Noir	3229	\$90.15	10.5%	3236	\$87.54	10.6%	-0.2%
Bordeaux Blend	2184	\$208.81	7.1%	2183	\$185.48	7.2%	0.0%
Merlot	1493	\$73.00	4.8%	1631	\$70.77	5.4%	-8.5%
Sauvignon Blanc	1579	\$58.15	5.1%	1603	\$54.14	5.3%	-1.5%
Brut	1428	\$160.85	4.6%	1373	\$156.80	4.5%	4.0%
Pinot Grigio/Gris	975	\$47.48	3.2%	992	\$46.03	3.3%	-1.7%
Red Blend	1328	\$85.25	4.3%	1180	\$77.04	3.9%	12.5%
Syrah/Shiraz	769	\$103.34	2.5%	782	\$98.43	2.6%	-1.7%
Zinfandel	657	\$61.94	2.1%	695	\$62.15	2.3%	-5.5%
Riesling	683	\$55.57	2.2%	683	\$53.38	2.2%	0.0%
Malbec	746	\$62.86	2.4%	740	\$60.90	2.4%	0.8%
Sangiovese	569	\$88.08	1.8%	609	\$86.90	2.0%	-6.6%
Rhone Blend	767	\$84.91	2.5%	651	\$81.42	2.1%	17.8%
Other	4791		15.6%	4731		15.5%	1.3%

BTB Breakdown by Price

Wines priced under \$60/bottle declined moderately while distribution above that price point rose by nearly 6%. The \$150-\$199 (+20%) was again the price segment that enjoyed the greatest percentage growth.

Price Segment	2018		2017		% CHG
	# Listings	% Share	# Listings	% Share	
<\$25.00	194	0.6%	196	0.6%	-1.0%
\$25-\$39.99	4073	13.2%	4543	14.9%	-10.3%
\$40-\$59.99	7966	25.9%	8120	26.7%	-1.9%
\$60 - \$99.99	9229	30.0%	9098	29.9%	1.4%
\$100-\$149	4787	15.5%	4494	14.8%	6.5%
\$150-\$199	2232	7.2%	1862	6.1%	19.9%
\$200+	2320	7.5%	2131	7.0%	8.9%
	30801		30444		

Producer Ranking – Chardonnay BTB

Sonoma-Cutrer replaces Cakebread at the top spot with the slimmest of margins. The rest of the top 5 producers repeated at last year's rankings.

Top Producers Excerpt – Chardonnay BTB

2018				2017		
Producer	BTB		Rank	Producer	BTB	
	# Listings	Ave. Price			# Listings	Ave. Price
Chardonnay	3723	\$77.64		Chardonnay	3599	\$77.09
Sonoma-Cutrer	165	\$55.85	1	Cakebread	163	\$90.97
Cakebread	161	\$90.92	2	Sonoma-Cutrer	149	\$55.85
Kendall-Jackson	118	\$42.09	3	Kendall-Jackson	130	\$41.47
Jordan	108	\$77.30	4	Jordan	102	\$75.12
Far Niente	82	\$113.05	5	Far Niente	85	\$111.49
Mer Soleil	79	\$62.65	6	Jadot, Maison Louis	79	\$93.87
Latour, Louis	76	\$104.50	7	Mer Soleil	72	\$60.66
Jadot, Maison Louis	72	\$79.03	8	Rombauer	72	\$78.43
Rombauer	67	\$81.00	9	Chateau Ste. Michelle	62	\$45.11
Leflaive, Olivier	62	\$113.14	10	Franciscan	61	\$59.14
Chalk Hill	59	\$81.70	11	Stag's Leap Wine Cell	55	\$72.00
Chateau Montelena	57	\$104.82	12	Chateau Montelena	51	\$104.15
Chateau Ste. Michelle	56	\$45.96	13	La Crema	51	\$50.95
La Crema	56	\$53.73	14	Newton	51	\$90.56
Newton	53	\$95.00	15	Chalk Hill	50	\$78.29

Supplier Supplement Excerpt – Cabernet Sauvignon BTB

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

Ste. Michelle Wine Estates remains at #1, maintaining its lead over #2 Constellation Brands as the leading Cabernet Sauvignon supplier while Jackson Family Wines replaces Treasury Wine Estates at #3.

2018	BTB			2017	BTB		
Supplier	# Listings	Ave. Price	Rank	Supplier	# Listings	Ave. Price	
Cabernet Sauvignon	5880	\$148.03		Cabernet Sauvignon	5756	135.0528	
Ste. Michelle Wine Est	371	\$116.01	1	Ste. Michelle Wine Est:	377	109.6387	
Constellation Brands	318	\$99.59	2	Constellation Brands	325	87.04412	
Jackson Family Wines	276	\$145.82	3	Treasury Wine Estates	293	117.5983	
Treasury Wine Estates	260	\$124.28	4	Jackson Family Wines	216	136.5847	
Silver Oak	197	\$167.21	5	Silver Oak	207	170.13	
Caymus	196	\$196.35	6	Caymus	200	193.8041	
E&J Gallo	177	\$72.41	7	Terlato	159	107.7581	
Kobrand	161	\$122.55	8	E&J Gallo	155	77.86667	
Duckhorn	138	\$97.60	9	Kobrand	146	134.2105	
Nickel & Nickel	134	\$202.92	10	Nickel & Nickel	135	211.7931	
Terlato	129	\$126.96	11	J. Lohr	105	51.125	
J. Lohr	122	\$56.83	12	Jordan	104	114.7619	
Jordan	101	\$118.62	13	Duckhorn	103	97.97778	
Daou	94	\$115.95	14	Hess Family Estates	93	\$66.32	
Hess Family Estates	91	\$84.09	15	Foley Family	91	\$96.26	