

WINEMETRICS

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SAMPLE WINE LIST ANALYSIS REPORT

New Features of the 2011-12 Winemetrics Chain Restaurant Report

The 2012 Wine List Analysis Report has two new features that will greatly enhance its value to our supplier clients. For the first time we are providing **supplier distribution share by market segment and individual chain**, allowing users to compare their portfolio's distribution share against that of their competition. This feature will be an invaluable tool to target chains where your portfolio is not providing the expected performance based on the segment average.

The second feature is **Winemetrics' Price Index**, which compares product pricing across segments (Casual, Upscale Casual and Fine-Dining) using over 25 benchmark wines, which include Kendall-Jackson Vintners Reserve Chardonnay, Sonoma-Cutrer Russian River Ranches Chardonnay, Veuve Clicquot Brut NV Yellow Label, Cakebread Chardonnay, Jordan Cabernet Sauvignon, Santa Margherita Pinot Grigio among many others. Benchmark wines appearing on a chain's wine list are compared to the average for the segment and are then averaged by account to create the **Winemetrics Price Index**. This 'yardstick' is an objective standard that may be used to formulate pricing recommendations for your products as well as advising your chain clients on overall pricing vis-à-vis their competition.

In addition to our reports valuable and unique new features, we have taken steps to provide more timely information in this report. Most of the larger casual-dining chain wine lists were surveyed in the second quarter of 2012, while the rest of the upscale casual and fine-dining chains were compiled in late November, 2011. Additionally, we have updated our supplier-brand affiliations to include the very latest transitions, including the Mark West purchase by Constellation Brands. We have expended every effort to make this report a current, valuable and unique resource for managing on-premise wine distribution.

I hope you find this report of great benefit in your efforts to improve your portfolio's on-premise distribution .

Yours truly,

Charles

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About Winemetrics' Chain Restaurant Report

Winemetrics Chain Restaurant Report is the premier source of on-premise chain wine distribution. Lists are analyzed by supplier, region, variety and price both by-the-glass (BTG) and by-the-bottle (BTB) and can be compared to the average of their respective competitive sets. Supplier share analysis and Winemetrics' Pricing Index, unique to Winemetrics' Chain Restaurant Report, provide unique insights on the competitive nature of each chain's wine list.

Unlike Winemetrics On-Premise Wine Distribution Report and our Supplier Report which uses a representative sample of a chain's account base, our Chain Restaurant Report compares each chain based on a single 'average' sample wine list. As a result the percentages of share by supplier, region, variety and price will be different as only one wine list per chain is utilized. This provides a distinct contrast from our other reports where a few placements in large chains will provide a significant ranking to a supplier, brand or variety. In our Chain Restaurant Report, suppliers must have a significant presence across all 160 chains surveyed to secure a high ranking.

In the following pages we will illustrate how our report can be utilized to discover distribution opportunities for your brands in individual chains. We classify accounts based on the number of unique wines by the bottle. Casual chains have from 13 to 50 wines, Upscale Casual from 51 to 100 and Fine-Dining over 100 unique wines. Chains are further categorized by cuisine which we divide into American, Asian, Italian, Seafood and Steakhouse. These broad categories provide us with a critical mass of accounts to provide a large enough base for comparison. We have as few as four accounts in a category (Fine-Dining Asian) to as many as 35 (Casual American).

On the following pages, we will compare a specific chain list to its chain segment average using Asian Café (an actual chain renamed so as not to compromise the identity of the company) and the Casual Asian Summary report. Comparing this chain's wine list composition against its segment's average reveals its strengths and weaknesses and how it currently performs against its competitive set. Based on these variations, recommendations can be made to improve the list. This method has been effectively employed by a number of suppliers to great effect in major chains and Winemetrics has worked with an upscale Casual American chain, Firebirds, to refine this process.

This excerpt offers key sample reports from our 2011-12 Chain Restaurant Report. They include:

Chain Segment Analysis (segments are defined by type – Casual, Upscale Casual, or Fine and cuisine e.g. American)

For the sample report on the following pages we have selected the Casual Asian Segment

Individual Chain Analysis Report

We have taken actual data from a Casual Asian chain in our report and renamed it Asian Café to protect its identity

Chain Wine List

The actual wine list data corresponding to the report above; data only includes wine names and pricing. No proprietary information from the wine list is included.

Comparing the Chain Segment and the Individual Chain Analysis reports to discover distribution opportunities is relatively easy and is illustrated in the pages below. We compare Asian Café with its segment competitive set and provide recommendations based on these differences.

2011-12 Winemetrics Chain Restaurant Report Account List

| | | |
|----------------------------|-----------------------------|--------------------------|
| Anthony's Coal Fired Pizza | Grand Lux Café | Pastini Pastaria |
| Bahama Breeze | Granite City | Patina Restaurant Group |
| Bandera | Green Mill | Patsy Grimaldi's |
| Bar Louie | Grillsmith | PF Chang's China Bistro |
| Benihana | Hennessey's | Phillips Seafood |
| Bertucci's | Hillstone | Piatti |
| Biaggi's | Hooked on Harry's | Quaintance-Weaver |
| BJ's Brewhouse | Houlihan's | Quarterdeck |
| Black Angus | Houston's | RA Sushi |
| BlackFinn | Il Fornaio | Ram Brewery |
| Bobby Van's | Islamorada Fish Company | Real Seafood |
| Bonefish Grill | J. Alexanders | Red Lobster |
| Bravo Cucina Italiana | J. Gilbert's | Redstone American Grill |
| Brio Tuscan Grille | Joe's American Bar & Grill | Rockbottom |
| Bristol/Devon Seafood | Joey | Romano's Macaroni Grill |
| Buca di Beppo | Johnny's Italian Steakhouse | Rosebud Restaurants |
| Burton's Grill | Keg Steakhouse | Roy's |
| CA Pizza Kitchen | Kimpton Resturants | Ruby Tuesday's |
| Cameron-Mitchell | Kincaid's | Russo's NY Pizza |
| Cantina Laredo | King's Fish House | Ruth's Chris |
| Canyons | Kona Grill | Salt Creek Grille |
| Capital Grille | Landry's Seafood | Saltgrass Steakhouse |
| Carino's Italian Grill | Lark Creek Restaurants | Seasons 52 |
| Carraba's | Legal Seafood | Select Restaurants |
| Cattlemens | LEYE Restaurants | Shulas |
| Champps | Ling & Louies | Skipjacks |
| Charleston's | Longhorn Steakhouse | Spaghetti Warehouse, The |
| Charlie Brown's | Louise's Trattoria | Spencer's |
| Chart House | MacKay Group | Stanford's |
| Cheesecake Factory | Maggiano's | Starr Restaurants |
| Chin Chin | Maria's Italian Kitchen | Stefani Restaurants |
| China Grill Mgmt. | Market Broiler | Stonewood Grill & Tavern |
| Chophouse of NC | Marmalade Café | Stoney River Steaks |
| Chuck's Steakhouse | McCormick & Schmick's | Sullivan's |
| Claim Jumper | Melting Pot, The | Sushi Samba |
| Clyde's | Mimi's Café | Tahoe Joe's |
| Copeland's | Mitchell's | Ted's Montana Grill |
| Craft | Mon Ami Gabi | Texas de Brazil |
| Crave | Morton's | Texas Land & Cattle |
| Daily Grill | Nobu | The Chophouse |
| Duke's Chowderhouse | North | The Palm |
| Elephant Bar & Restaurant | Not Your Average Joe's | Tommy Bahama |
| Finn & Porter | Ocean Prime | Tony Roma's |
| Firebirds Rocky Mtn. Grill | Oceanaire | Truluck's |
| Fishmarket | Olive Garden | Uno Chicago Grill |
| Flanigan's | One Group | Village Tavern |
| Flemings | Osha Thai | Weber Grill |
| Fogo de Chao | Outback Steakhouse | Wildfire |
| Francesca's | Palomino | Wolfgang Puck |
| Gallagher's | Papa Razzi | Wood Ranch |
| George Martin | Pappadeaux Seafood Kitchens | Yardhouse |
| Gordon Biersch | Pappa's Seafood House | Zios Italian |



WINEMETRICS

Casual Asian Segment Analysis

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Account Type: Casual
Cuisine: Asian
Chains/Restaurant Groups: 10

List of Accounts, # Listings, Average Pricing and List Size Index

By the Bottle Distribution Overview

| Chain name | # Listings | Ave. Price | BTB Size Index | Winemetrics Price Index |
|----------------|------------|------------|----------------|-------------------------|
| Total BTB | 328 | \$40.20 | | |
| Benihana | 35 | \$44.17 | 112 | 104 |
| Chin Chin | 18 | \$30.67 | 58 | 110 |
| Elephant Bar | 25 | \$23.14 | 80 | 80 |
| Fat's Bistro | 49 | \$43.63 | 157 | 97 |
| In the Raw | 32 | \$50.06 | 103 | 112 |
| Kona Grill | 26 | \$41.96 | 84 | 97 |
| Ling & Louie's | 19 | \$28.00 | 61 | 98 |
| Osha Thai | 48 | \$51.46 | 154 | 118 |
| PF Changs | 50 | \$33.82 | 161 | 86 |
| Ra Sushi | 26 | \$37.88 | 84 | 110 |
| Average | 33 | | | |

By the Glass Distribution Overview

| Chain name | # Listings | Ave. Price | BTG Size Index |
|----------------|------------|------------|----------------|
| Total BTG | 260 | \$8.85 | |
| Benihana | 22 | \$9.26 | 85 |
| Chin Chin | 22 | \$8.50 | 85 |
| Elephant Bar | 29 | \$7.62 | 112 |
| Fat's Bistro | 26 | \$9.34 | 100 |
| In the Raw | 25 | \$8.57 | 96 |
| Kona Grill | 22 | \$9.57 | 85 |
| Ling & Louie's | 19 | \$7.75 | 73 |
| Osha Thai | 30 | \$9.23 | 115 |
| PF Changs | 41 | \$8.98 | 158 |
| Ra Sushi | 24 | \$9.58 | 92 |
| Average | 26 | \$8.84 | |



Top 20 Suppliers BTB and BTG

Casual Asian Top Suppliers

| Supplier | BTB Share | # Listings | Ave. Price | Rank |
|----------------------------|-----------|------------|------------|------|
| Constellation Brands | 11.6% | 38 | \$34.72 | 1 |
| Ste. Michelle Wine Estates | 7.9% | 26 | \$34.67 | 2 |
| Treasury Wine Estates | 5.2% | 17 | \$33.76 | 3 |
| Trincherero | 4.0% | 13 | \$29.38 | 4 |
| E&J Gallo | 3.7% | 12 | \$33.42 | 5 |
| Jackson Family Wines | 3.7% | 12 | \$35.04 | 6 |
| Terlato | 3.4% | 11 | \$43.05 | 7 |
| Moet-Hennessy USA | 2.7% | 9 | \$90.22 | 8 |
| Diageo | 2.1% | 7 | \$36.36 | 9 |
| Caymus | 1.8% | 6 | \$53.67 | 10 |
| Kobrand | 1.8% | 6 | \$60.67 | 11 |
| Palm Bay International | 1.8% | 6 | \$26.08 | 12 |
| Francis Coppola | 1.5% | 5 | \$32.80 | 13 |
| Pernod Ricard | 1.5% | 5 | \$30.30 | 14 |
| Brown Forman | 1.2% | 4 | \$42.00 | 15 |
| DFV | 1.2% | 4 | \$30.50 | 16 |
| Folio | 1.2% | 4 | \$31.50 | 17 |
| The Wine Group | 1.2% | 4 | \$27.25 | 18 |
| Accolade | 0.9% | 3 | \$28.67 | 19 |
| Banfi Vintners | 0.9% | 3 | \$29.00 | 20 |

| Supplier | BTG Share | # Listings | Ave. Price | Rank |
|----------------------------|-----------|------------|------------|------|
| Constellation Brands | 14.6% | 38 | \$8.24 | 1 |
| Ste. Michelle Wine Estates | 8.1% | 21 | \$8.20 | 2 |
| E&J Gallo | 4.6% | 12 | \$8.88 | 3 |
| Jackson Family Wines | 4.6% | 12 | \$10.18 | 4 |
| Trincherero | 4.6% | 12 | \$7.98 | 5 |
| Treasury Wine Estates | 4.2% | 11 | \$7.04 | 6 |
| Terlato | 3.5% | 9 | \$11.47 | 7 |
| Diageo | 2.3% | 6 | \$8.78 | 8 |
| Caymus | 1.9% | 5 | \$12.80 | 9 |
| Palm Bay International | 1.9% | 5 | \$7.99 | 10 |
| Pernod Ricard | 1.9% | 5 | \$8.65 | 11 |
| DFV | 1.5% | 4 | \$8.19 | 12 |
| Folio | 1.5% | 4 | \$9.25 | 13 |
| Francis Coppola | 1.5% | 4 | \$8.56 | 14 |
| Bogle | 1.2% | 3 | \$7.42 | 15 |
| Brown Forman | 1.2% | 3 | \$12.00 | 16 |
| J. Lohr | 1.2% | 3 | \$9.83 | 17 |
| Moet-Hennessy USA | 1.2% | 3 | \$9.32 | 18 |
| The Wine Group | 1.2% | 3 | \$7.00 | 19 |



BTB Share by Price Segment

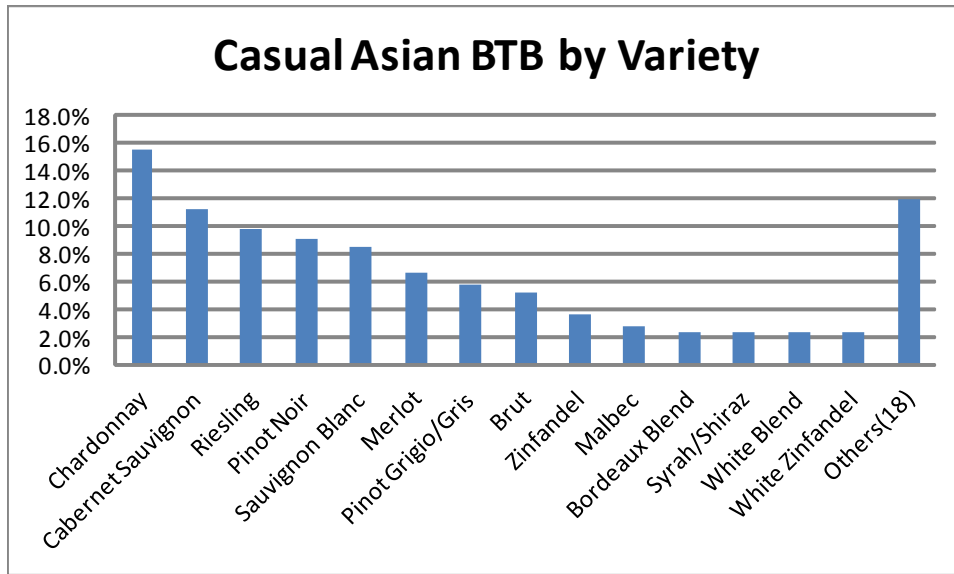
| | % Share | # Listings | Ave. Price |
|--------------|----------------|-------------------|-------------------|
| Total BTB | | 328 | \$40.20 |
| <\$25.00 | 10.4% | 34 | \$20.79 |
| \$25-\$39.99 | 56.4% | 185 | \$31.93 |
| \$40-\$59.99 | 21.3% | 70 | \$47.43 |
| \$60 - \$100 | 11.0% | 36 | \$75.86 |
| \$100+ | 0.9% | 3 | \$173.33 |

BTG Share by Price Segment

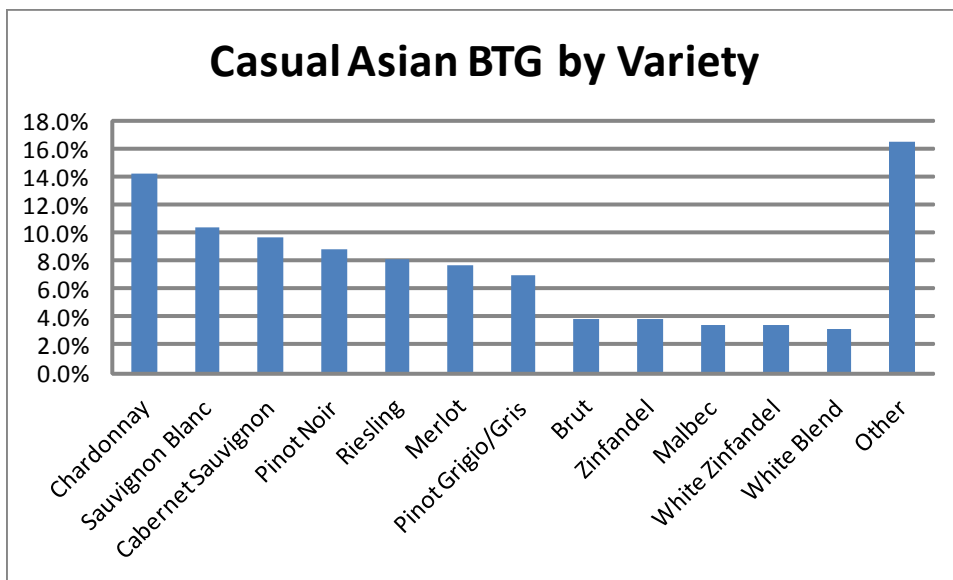
| | % Share | # Listings | Ave. Price |
|--------------|----------------|-------------------|-------------------|
| Total BTG | | 260 | \$8.85 |
| <\$6.00 | 6.9% | 18 | \$5.48 |
| \$6-\$6.99 | 5.4% | 14 | \$6.48 |
| \$7-\$7.99 | 19.6% | 51 | \$7.39 |
| \$8-\$8.99 | 24.2% | 63 | \$8.25 |
| \$9-\$9.99 | 15.4% | 40 | \$9.21 |
| \$10-\$11.99 | 16.9% | 44 | \$10.48 |
| \$12+ | 11.5% | 30 | \$12.87 |



BTB Share by Variety



BTG Share by Variety





| | | | | |
|---------------|-------------------|---------------------|----------------|---------------|
| Chain Name: | Asian Café | | BTB | BTG |
| Account Type: | Casual | # Listings | 35 | 22 |
| Cuisine: | Asian | Ave. Price | \$44.17 | \$9.26 |
| # Units: | 72 | | | |
| | | Price Index: | 104 | |

Benihana

BTB Share by Supplier

| Asian Café | % Share | # Listings | Ave. Price |
|----------------------------|---------|------------|------------|
| BTB Total | | 35 | \$44.17 |
| Ste. Michelle Wine Estates | 11% | 4 | \$44.25 |
| Treasury Wine Estates | 11% | 4 | \$43.25 |
| Constellation Brands | 9% | 3 | \$42.00 |
| E&J Gallo | 9% | 3 | \$32.67 |
| Jackson Family Wines | 9% | 3 | \$38.67 |
| Kobrand | 9% | 3 | \$64.33 |
| Terlato | 9% | 3 | \$48.67 |
| Alexander Valley Vineyards | 3% | 1 | \$40.00 |
| Banfi Vintners | 3% | 1 | \$36.00 |
| Caymus | 3% | 1 | \$48.00 |
| Moet-Hennessy USA | 3% | 1 | \$85.00 |
| Francis Coppola | 3% | 1 | \$28.00 |
| Trincherero | 3% | 1 | \$30.00 |
| Pasternak | 3% | 1 | \$42.00 |
| Seaglass | 3% | 1 | \$30.00 |
| Temptation | 3% | 1 | \$34.00 |
| Vintus LLC | 3% | 1 | \$68.00 |
| Wente | 3% | 1 | \$30.00 |
| Ferrari-Carano | 3% | 1 | \$46.00 |

BTG Share by Supplier

| Supplier BTG | % Share | # Listings | Ave. Price |
|----------------------------|---------|------------|------------|
| Total | | 22 | \$9.26 |
| Constellation Brands | 14% | 3 | \$11.00 |
| E&J Gallo | 14% | 3 | \$8.67 |
| Jackson Family Wines | 14% | 3 | \$10.17 |
| Ste. Michelle Wine Estates | 14% | 3 | \$7.75 |
| Terlato | 9% | 2 | \$11.13 |
| Treasury Wine Estates | 9% | 2 | \$6.88 |
| Caymus | 5% | 1 | \$13.00 |
| Francis Coppola | 5% | 1 | \$7.50 |
| Seaglass | 5% | 1 | \$8.00 |
| Temptation | 5% | 1 | \$10.00 |
| Trincherero | 5% | 1 | \$8.50 |
| Wente | 5% | 1 | \$8.00 |

**BTB Share by Country**

| Country | % Share | # Listings | Ave. Price |
|------------------|---------|------------|------------|
| Total BTB | | 35 | \$44.17 |
| Argentina | 3% | 1 | \$36.00 |
| Australia | 3% | 1 | \$52.00 |
| France | 9% | 3 | \$69.00 |
| Germany | 3% | 1 | \$32.00 |
| Italy | 6% | 2 | \$42.00 |
| New Zealand | 3% | 1 | \$38.00 |
| U.S. | 74% | 26 | \$42.19 |

BTG Share by Country

| Asian Café | % Share | # Listings | Ave. Price |
|------------------|---------|------------|------------|
| Total BTG | | 22 | \$9.26 |
| Argentina | 5% | 1 | \$9.50 |
| Germany | 5% | 1 | \$8.50 |
| Italy | 5% | 1 | \$8.50 |
| New Zealand | 5% | 1 | \$8.50 |
| U.S. | 82% | 18 | \$8.50 |

BTB Share by Price Segment

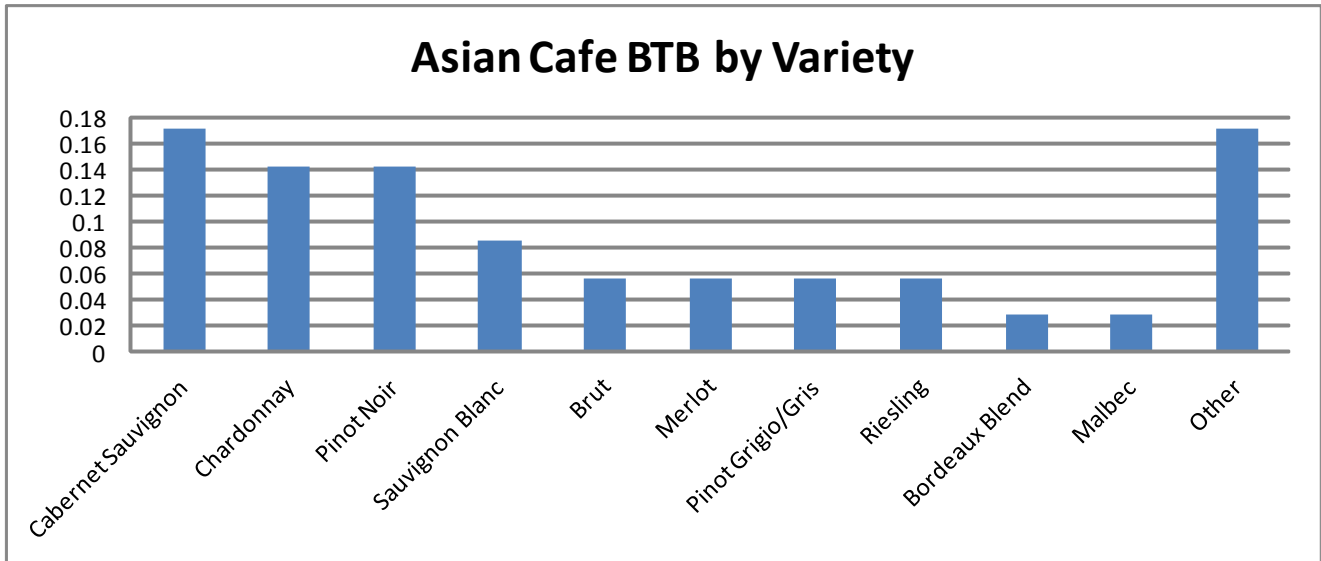
| Asian Café | | | |
|------------------|---------|------------|------------|
| Price Segment | % Share | # Listings | Ave. Price |
| Total BTB | | 35 | \$44.17 |
| \$25-\$39.99 | 51% | 18 | \$31.56 |
| \$40-\$59.99 | 29% | 10 | \$45.80 |
| \$60 - \$100 | 20% | 7 | \$74.29 |

BTG Share by Price Segment

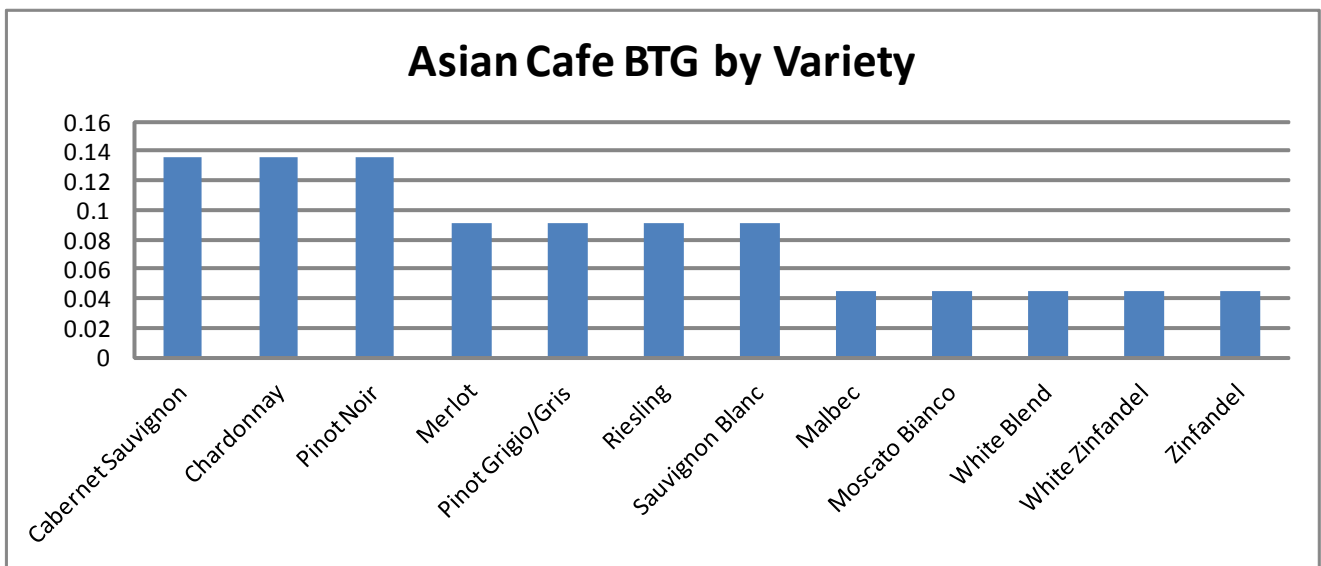
| Asian Café | | | |
|------------------|---------|------------|------------|
| Price Segment | % Share | # Listings | Ave. Price |
| Total BTG | | 22 | \$9.26 |
| \$6-\$6.99 | 5% | 1 | \$6.75 |
| \$7-\$7.99 | 23% | 5 | \$7.35 |
| \$8-\$8.99 | 23% | 5 | \$8.35 |
| \$9-\$9.99 | 18% | 4 | \$9.38 |
| \$10-\$11.99 | 18% | 4 | \$10.44 |
| \$12+ | 14% | 3 | \$13.08 |



BTB Share by Variety



BTG Share by Variety



Asian Café* vs. Casual Asian Segment Analysis

On the following pages we compare Asian Café* against the Casual Asian segment to reveal distribution opportunities. The second page of the summary report and chain report provide supplier share of distribution. We have combined the BTB data from each report to facilitate examination.

We see that Constellation Brands is the dominant supplier in the segment with 12% of distribution compared to 8% for Ste. Michelle. On Asian Café's list, the top spot is shared by Ste. Michelle and Treasury Wine Estates. Constellation Brand is 3rd place with 9% along with 4 other suppliers.

Suppliers may use this report to monitor their portfolio's progress among all 160 chains in our report and determine if it is performing on par with the segment average.

BTB Share by Supplier

Casual Asian Top Suppliers

| Supplier | % Share | # Listings | Ave. Price |
|-------------------------|---------|------------|------------|
| Constellation Brands | 11.6% | 38 | \$34.72 |
| Ste. Michelle Wine Estā | 7.9% | 26 | \$34.67 |
| Treasury Wine Estates | 5.2% | 17 | \$33.76 |
| Trincherō | 4.0% | 13 | \$29.38 |
| E&J Gallo | 3.7% | 12 | \$33.42 |
| Jackson Family Wines | 3.7% | 12 | \$35.04 |
| Terlato | 3.4% | 11 | \$43.05 |
| Moet-Hennessy USA | 2.7% | 9 | \$90.22 |
| Diageo | 2.1% | 7 | \$36.36 |
| Caymus | 1.8% | 6 | \$53.67 |

| Asian Café | % Share | # Listings | Ave. Price |
|-------------------------|---------|------------|------------|
| BTB Total | | 35 | \$44.17 |
| Ste. Michelle Wine Estā | 11% | 4 | \$44.25 |
| Treasury Wine Estates | 11% | 4 | \$43.25 |
| Constellation Brands | 9% | 3 | \$42.00 |
| E&J Gallo | 9% | 3 | \$32.67 |
| Jackson Family Wines | 9% | 3 | \$38.67 |
| Kobrand | 9% | 3 | \$64.33 |
| Terlato | 9% | 3 | \$48.67 |
| Alexander Valley Viney | 3% | 1 | \$40.00 |
| Banfi Vintners | 3% | 1 | \$36.00 |
| Caymus | 3% | 1 | \$48.00 |

Note: *Asian Café is a pseudonym for a Casual Asian Chain in our database. Identity made available to clients.

In comparing BTG distribution by supplier, we see that Constellation Brands, while again dominant in the Casual Asian segment, shares top distribution with 3 other suppliers on Asian Cafe's list.

It is interesting to note that while Treasury Wine Estates (TWE) shared the #1 BTB spot with Ste. Michelle, it has fallen to 6th place BTG, although its 9% BTG share is twice its share in the segment.

BTG Share by Supplier

Casual Asian Top Suppliers

| Supplier | % Share | # Listings | Ave. Price |
|--------------------------|---------|------------|------------|
| Constellation Brands | 14.6% | 38 | \$8.24 |
| Ste. Michelle Wine Estab | 8.1% | 21 | \$8.20 |
| E&J Gallo | 4.6% | 12 | \$8.88 |
| Jackson Family Wines | 4.6% | 12 | \$10.18 |
| Trincherro | 4.6% | 12 | \$7.98 |
| Treasury Wine Estates | 4.2% | 11 | \$7.04 |
| Terlato | 3.5% | 9 | \$11.47 |
| Diageo | 2.3% | 6 | \$8.78 |
| Caymus | 1.9% | 5 | \$12.80 |
| Palm Bay International | 1.9% | 5 | \$7.99 |

Asian Café

| Supplier | % Share | # Listings | Ave. Price |
|--------------------------|---------|------------|------------|
| Constellation Brands | 14% | 3 | \$11.00 |
| E&J Gallo | 14% | 3 | \$8.67 |
| Jackson Family Wines | 14% | 3 | \$10.17 |
| Ste. Michelle Wine Estab | 14% | 3 | \$7.75 |
| Terlato | 9% | 2 | \$11.13 |
| Treasury Wine Estates | 9% | 2 | \$6.88 |

Asian Café has less regional variety than the Casual Asian segment as a whole. While it has higher French wine distribution it is lacking wines from Austria, Chile, Spain and South Africa. Germany also has half the share on Asian Café's list compared to the segment average.

Note that when examining the average price of Asian Café's German wines is more than \$20 lower than the average and its Australian selection is \$30 above the average.

BTB Share by Supplier

Casual Asian Segment

| Country of Origin | % Share | # Listings | Ave. Price |
|-------------------|---------|------------|------------|
| Argentina | 3.0% | 10 | \$31.60 |
| Austria | 0.3% | 1 | \$34.00 |
| Australia | 3.4% | 11 | \$31.68 |
| Chile | 0.9% | 3 | \$31.33 |
| France | 4.0% | 13 | \$84.62 |
| Germany | 7.3% | 24 | \$55.35 |
| Italy | 6.4% | 21 | \$34.64 |
| New Zealand | 4.3% | 14 | \$36.79 |
| South Africa | 0.3% | 1 | \$30.00 |
| Spain | 2.4% | 8 | \$33.13 |
| U.S. | 67.7% | 222 | \$37.97 |

Asian Café

| Country | % Share | # Listings | Ave. Price |
|-------------|---------|------------|------------|
| Argentina | 3% | 1 | \$36.00 |
| Australia | 3% | 1 | \$52.00 |
| France | 9% | 3 | \$69.00 |
| Germany | 3% | 1 | \$32.00 |
| Italy | 6% | 2 | \$42.00 |
| New Zealand | 3% | 1 | \$38.00 |
| U.S. | 74% | 26 | \$42.19 |

The geographic diversity of Asian Café is far below that of the Casual Asian average, with no entries from Australia, Chile, France or Spain and more heavily weighted to domestic selections.

Part of the issue here is that Asian Café has a BTG list that is 15% smaller than the average, perhaps if it increased the size of its BTG selection it could accommodate more regional diversity

BTG Share by Supplier

Casual Asian Segment

| Country of Origin | % Share | # Listings | Ave. Price |
|-------------------|---------|------------|------------|
| Argentina | 3.8% | 10 | \$8.60 |
| Austria | 0.4% | 1 | \$8.00 |
| Australia | 3.8% | 10 | \$8.02 |
| Chile | 1.2% | 3 | \$7.92 |
| France | 0.8% | 2 | \$9.50 |
| Germany | 5.0% | 13 | \$9.77 |
| Italy | 6.9% | 18 | \$9.40 |
| New Zealand | 5.0% | 13 | \$9.79 |
| South Africa | 0.4% | 1 | \$8.00 |
| Spain | 3.1% | 8 | \$8.25 |
| U.S. | 69.6% | 181 | \$8.76 |

Asian Café

| Country | % Share | # Listings | Ave. Price |
|-------------|---------|------------|------------|
| Argentina | 5% | 1 | \$9.50 |
| Germany | 5% | 1 | \$8.50 |
| Italy | 5% | 1 | \$8.50 |
| New Zealand | 5% | 1 | \$8.50 |
| U.S. | 82% | 18 | \$8.50 |

Note that 2/3 of the Casual Asian segments wines are priced under \$40 compared to about 50% of Asian Café's. There are also no wines under \$25 on Asian Cafés list but twice the distribution in the \$60 - \$100 segment compared to the average.

Asian Café 's BTB pricing structure is more similar to an Upscale Casual, but its smaller size defines it as a Casual chain. Given its reputation for quality, Asian Café should expand its BTB selection to meet customer expectations.

BTB Share by Price Segment

Casual Asian

| Price Segment | % Share | # Listings | Ave. Price |
|---------------|---------|------------|------------|
| <\$25.00 | 10.4% | 34 | \$20.79 |
| \$25-\$39.99 | 56.4% | 185 | \$31.93 |
| \$40-\$59.99 | 21.3% | 70 | \$47.43 |
| \$60 - \$100 | 11.0% | 36 | \$75.86 |
| \$100+ | 0.9% | 3 | \$173.33 |

Asian Café

| Price Segment | % Share | # Listings | Ave. Price |
|---------------|---------|------------|------------|
| \$25-\$39.99 | 51% | 18 | \$31.56 |
| \$40-\$59.99 | 29% | 10 | \$45.80 |
| \$60 - \$100 | 20% | 7 | \$74.29 |

Asian Cafe's BTG distribution does not differ greatly from the Casual Asian segment as a whole. Slightly higher percentage of wine over \$9/glass and none priced under \$6.

BTG Share by Price Segment

Casual Asian

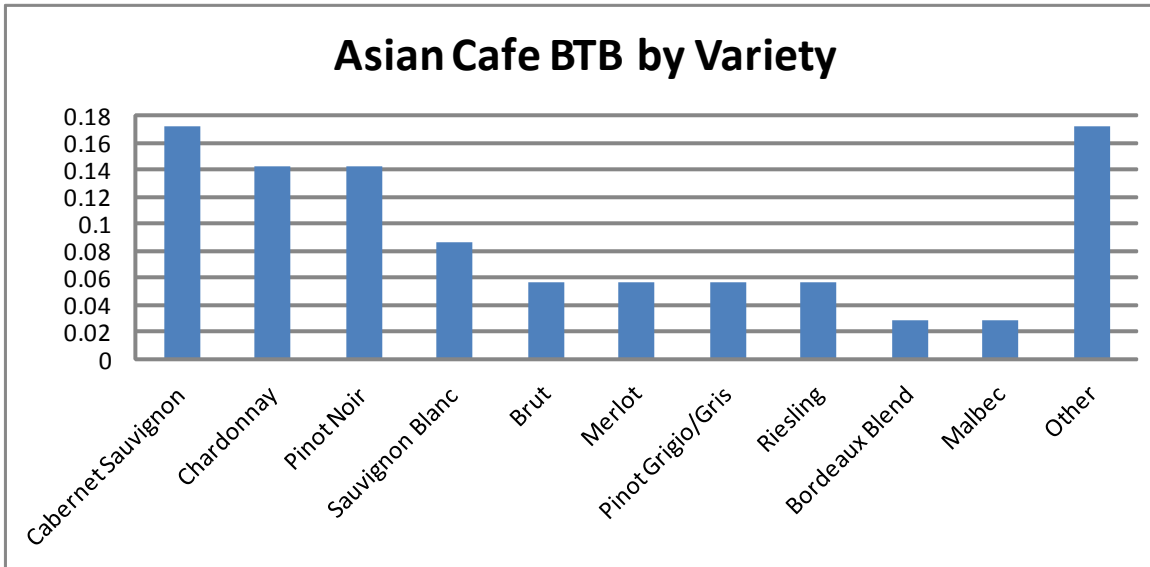
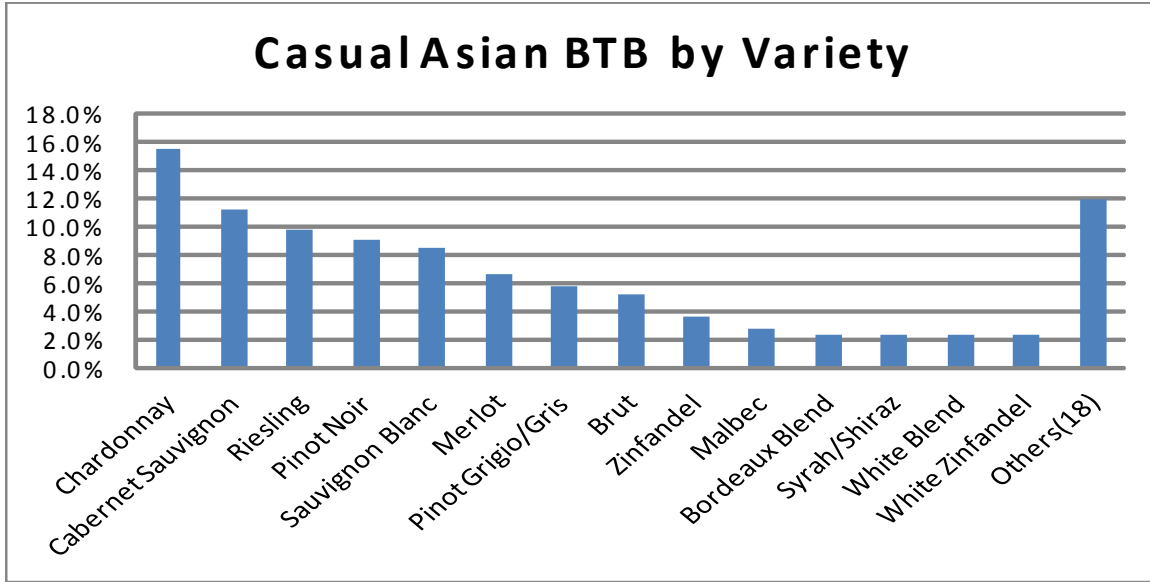
| Price Segment | % Share | # Listings | Ave. Price |
|---------------|---------|------------|------------|
| <\$6.00 | 6.9% | 18 | \$5.48 |
| \$6-\$6.99 | 5.4% | 14 | \$6.48 |
| \$7-\$7.99 | 19.6% | 51 | \$7.39 |
| \$8-\$8.99 | 24.2% | 63 | \$8.25 |
| \$9-\$9.99 | 15.4% | 40 | \$9.21 |
| \$10-\$11.99 | 16.9% | 44 | \$10.48 |
| \$12+ | 11.5% | 30 | \$12.87 |

Asian Café

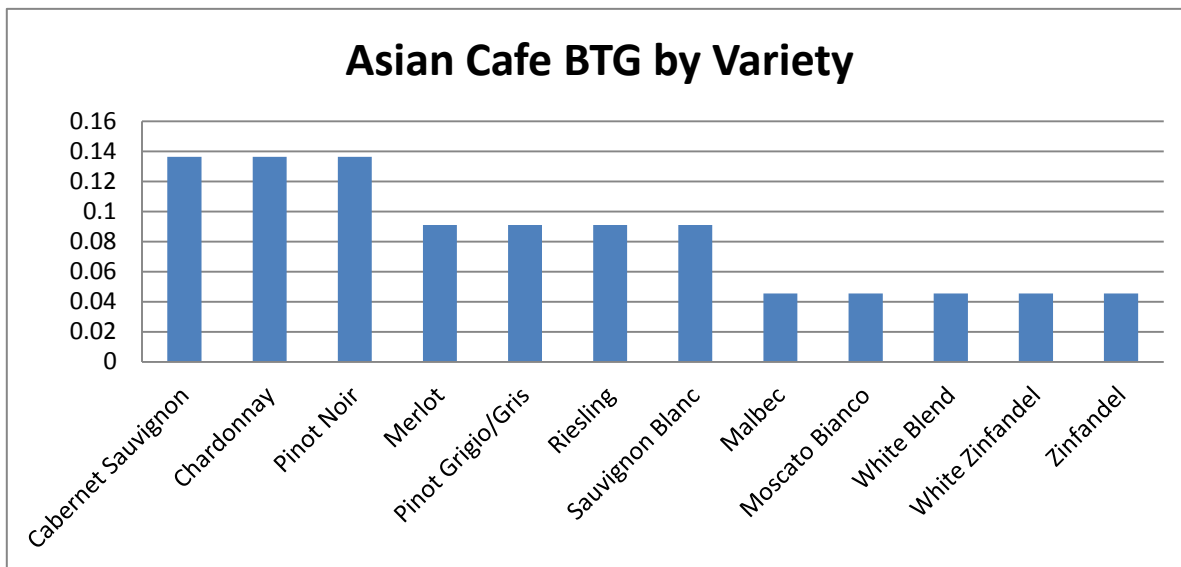
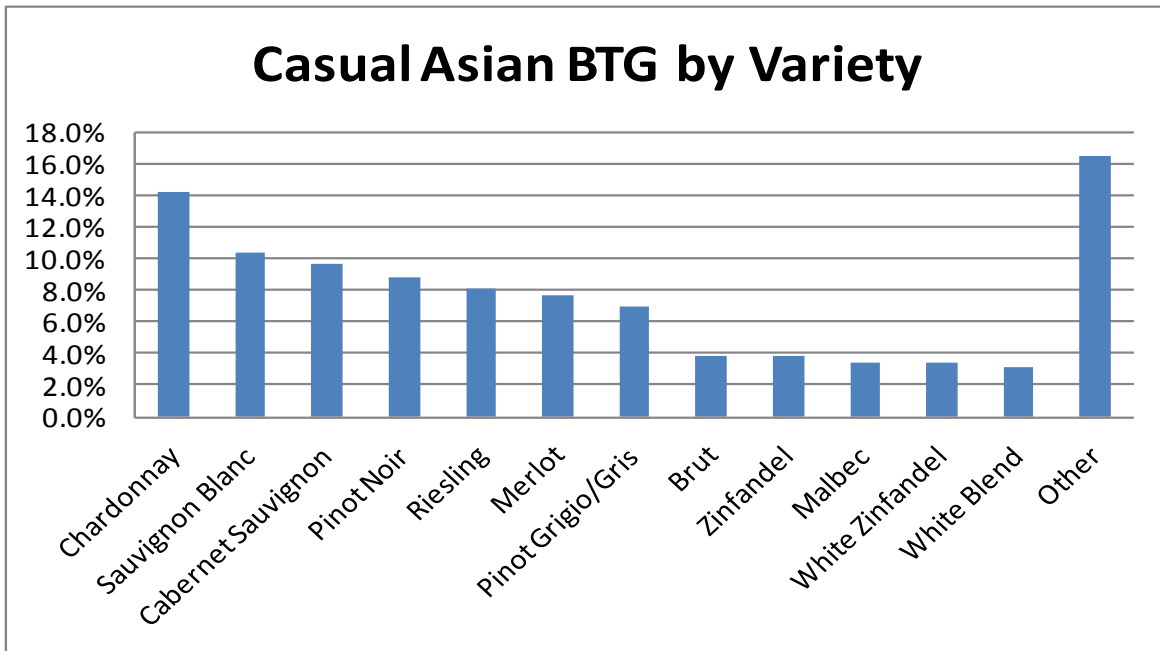
| Price Segment | % Share | # Listings | Ave. Price |
|---------------|---------|------------|------------|
| \$6-\$6.99 | 5% | 1 | \$6.75 |
| \$7-\$7.99 | 23% | 5 | \$7.35 |
| \$8-\$8.99 | 23% | 5 | \$8.35 |
| \$9-\$9.99 | 18% | 4 | \$9.38 |
| \$10-\$11.99 | 18% | 4 | \$10.44 |
| \$12+ | 14% | 3 | \$13.08 |

Asian Café 's varietal distribution was quite different from the Casual Asian average. Riesling accounts for nearly 10% of distribution in the overall segment but Asian Café has less than half that amount. Cabernet Sauvignon accounts for 17% of distribution at Asian Café but only 11% in the overall segment. Likewise, Pinot Noir is distribution is 14% and 9% respectively.

BTB Share by Variety



Both the Casual Asian segment and Asian Café had Chardonnay as the #1 variety BTG at 14%, which in Asian Café's case was matched by Cabernet Sauvignon and Pinot Noir. Those varieties had a 10% and 8% share respectively in the overall segment



Asian Café Wine List *

| Producer | Country | Region | Appellation | Variety | Designation | Glass | Bottle |
|---------------------------------|-------------|-----------------|-----------------------------|--------------------|----------------------|---------|---------|
| Mumm Cuvee Napa | U.S. | California | Napa Valley | Brut | M | \$11.00 | |
| Domaine Carneros | U.S. | California | Carneros | Brut | | | \$48.00 |
| Moet & Chandon | France | Champagne | Epernay | Brut | Imperial | | \$85.00 |
| Cantine Maschio | Italy | Veneto | | Prosecco | | | \$36.00 |
| Rothschild Lafite, Barons de | France | Bordeaux | Medoc | Bordeaux Blend | Reserve Speciale | | \$42.00 |
| Alexander Valley Vineyards | U.S. | California | Alexander Valley | Cabernet Sauvignon | | | \$40.00 |
| Chateau Montelena | U.S. | California | Napa Valley | Cabernet Sauvignon | | | \$68.00 |
| Hayes Ranch | U.S. | California | Central Coast Alexander | Cabernet Sauvignon | | \$8.00 | \$30.00 |
| Martini, Louis M. | U.S. | California | Valley Alexander | Cabernet Sauvignon | | \$9.00 | \$34.00 |
| Simi | U.S. | California | Valley | Cabernet Sauvignon | | \$13.50 | \$52.00 |
| Stag's Leap Wine | U.S. | California | Napa Valley | Cabernet Sauvigr | Artemis | | \$90.00 |
| Don Miguel Gascon | Argentina | Cuyo | Mendoza Columbia | Malbec | | \$9.50 | \$36.00 |
| 14 Hands | U.S. | Washington | Valley | Merlot | | \$7.75 | \$29.00 |
| Tangley Oaks | U.S. | California | California Santa Maria | Merlot | | \$9.50 | \$36.00 |
| Cambria | U.S. | California | Valley Monterey | Pinot Noir | Julia's Vineyard | \$11.00 | \$42.00 |
| Estancia | U.S. | Califomia | County | Pinot Noir | Pinnacles | \$9.50 | \$36.00 |
| Jadot, Domaine Louis | France | Burgundy | Pommard | Pinot Noir | | | \$80.00 |
| Jargon | U.S. | California | California | Pinot Noir | | \$8.50 | \$30.00 |
| Sokol Blosser | U.S. | Oregon | Dundee Hills | Pinot Noir | | | \$62.00 |
| Penfolds | Australia | South Australia | Barossa Valley Alexander | Syrah/Shiraz | Kalimna Bin 28 | | \$52.00 |
| Temptation | U.S. | California | Valley | Zinfandel | | \$10.00 | \$34.00 |
| Beringer | U.S. | California | California | White Zinfandel | | \$6.75 | \$25.00 |
| Beringer | U.S. | California | Napa Valley | Chardonnay | Private Reserve | | \$70.00 |
| Cakebread | U.S. | California | Napa Valley | Chardonnay | | | \$65.00 |
| Canyon Road | U.S. | California | California | Chardonnay | | \$7.50 | \$28.00 |
| Kendall-Jackson | U.S. | California | California | Chardonnay | Vintner's Reserve | \$8.75 | \$34.00 |
| La Crema | U.S. | California | Sonoma Coast | Chardonnay | | \$10.75 | \$40.00 |
| Beringer | U.S. | California | California | Moscato Bianco | | \$7.00 | \$26.00 |
| Francis Coppola | U.S. | California | California | Pinot Grigio/Gris | Bianco | \$7.50 | \$28.00 |
| Santa Margherita | Italy | Adige | Alto Adige Columbia | Pinot Grigio/Gris | | \$12.75 | \$48.00 |
| Chateau Ste. Michelle | U.S. | Washington | Valley | Riesling | | \$7.00 | \$26.00 |
| Saint M | Germany | Germany | | Riesling | | \$8.50 | \$32.00 |
| Crawford, Kim | New Zealand | Marlborough | Marlborough Sonoma | Sauvignon Blanc | | \$10.00 | \$38.00 |
| Ferrari-Carano | U.S. | California | County Santa Barbara | Sauvignon Blanc | Fume Blanc | | \$46.00 |
| Seaglass | U.S. | California | County | Sauvignon Blanc | | \$8.00 | \$30.00 |
| Caymus | U.S. | California | California | White Blend | Conundrum | \$13.00 | \$48.00 |

*only wine entries and pricing are captured in the above rendition – wine order, descriptions and/or other proprietary data are not listed

Observations/Recommendations for Asian Café

All recommendations are based on a comparison of Asian Café against the average of its competitive set as revealed in the previous pages. Brand recommendations are based on Winemetrics 2011 On-Premise Wine Distribution which provides rankings of the most popular brands by variety.

1. Overall Asian Café's wine list is well-balanced approximating the segment average in size, varietal selection and pricing. Nearly all of its entries are among the top 100 on-premise brands as defined by Winemetrics 2011 On-Premise Wine Distribution Report
2. Increase the number of BTG selections to be on par with the size of the BTB list
3. Add a few wines under \$7 BTG and a couple of selections under \$25
4. Broaden the regional diversity with wines from Chile, Australia and/or Spain
5. Reduce the number of Cabernet Sauvignon and increase the number of Riesling and Sauvignon Blanc BTB
6. Recommend adjusting Cabernet Sauvignon selection to include more top 25 brands as defined by Winemetrics 2011 On-Premise Wine Distribution Report.
7. Asian Café has the average number of varieties for the Casual Asian Segment, it should add a few whites possible Albarino, Chenin Blanc or Gewurztraminer.