



# WINEMETRICS

## 2018 On-Premise Wine Distribution Report

Featuring 2018-2017 Trend Analysis

Includes 2019 Supplier Rankings by Variety



WINEMETRICS

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## Introduction

This is the tenth edition of **Winemetrics** *On-Premise Wine Distribution Report*. Over 90% of the wine lists used in this report were compiled from November 1, 2018 through February, 2019. We have again carefully matched our 2018 account samples to provide very accurate trend analysis this year while continue to replace declining chains with more dynamic concepts. New for 2018 include 110 Grill, Pinstripes, Top Golf, King Bowl and Harvest Seasonal Grill. A total of 175 restaurant groups and chains were surveyed for this report, representing nearly 9,800 establishments nationwide.

Should you wish to acquire more detailed information about specific chains, wine varieties and/or brands, please contact us at [info@winemetrics.com](mailto: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 35 years of experience at all levels of the wine industry and has been providing on-premise wine distribution analysis to the industry for over a decade.

In addition to our annual reports, Winemetrics provides custom analysis of supplier portfolios 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](mailto:info@winemetrics.com).

## Highlights from Winemetrics 2018 On-Premise Wine Distribution Report

Below are some highlights from our 2018 On-Premise Wine Distribution Report:

- Survey Profile:
  - 175 chains/restaurant groups were surveyed in 2018.
  - 8 chains/groups from 2017 were replaced with newer concepts in 2018
  - Total units represented each year 2018: 9750 2017: 10,202
  - Total BTG listings fell -2% and BTB listings were flat (+0.2%)
  
- Distribution Growth Leaders – Producers with robust growth in 2017 (BTB only)
  - 14 Hands
  - Kim Crawford
  - Canyon Road
  - The Prisoner Wine Co.
  - La Marca
  - Josh Cellars
  
- Countries/Regions – Regions that greatly exceeded average in 2018 (BTB only)
  - U.S./Washington State
  - France
  - Australia
  - New Zealand

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

## List of Major Restaurant Chains/Groups Used in Our 2018 Sample

110 Grill	Dos Caminos	Longhorn Steakhouse	Ruby Tuesday
99 Restaurant	Duke's Chowderhouse	Lucille's BBQ	Russo's Pizza
Anthony's CF Pizza	Earl's	Lucky Strike	Rusty Bucket, The
Bad Daddy's Burger	Eddie Merlot's	Maggianos	Ruth's Chris
Bahama Breeze	Eddie V's	Marlow's Tavern	Salt Creek Grille
Bar Louie	Elephant Bar	Mastro's	Saltgrass Steakhouse
Benihana	Finn & Porter	Matchbox Pizza	Sauce Pizza & Wine
Bertucci's	Firebirds	McCormick & Schmick's	Seasons 52
Biaggis	Fish City Grill	Mellow Mushroom	Sedona Taphouse
BJs	Fishmarket	Melting Pot, The	Shula's
Black Angus	Flanigan's	Miller's Ale House	Sizzling Steak Concepts
Black Finn	Flemings	Mimi's Café	Smokey Bones
Blue Sushi Sake	Fox & Hound	Mitchell's	Spaghetti Warehouse
Bluewater Grill	Francesca's	Mon Ami Gabi	Stanford's
Bonefish Grill	Gordon Biersch	Morton's	Stir Crazy
Brass Tap, The	Grand Lux	Nobu	Stonewood
Bravo	Granite City	North	Stoney River
Brick House	Grillsmith	Not Your Average Joe's	Sushi Samba
Brio	Grimaldi's	Ocean Prime	Tahoe Joe's
Brixx Pizza	Half Shell Oyster House	Ocanaire	Ted's Montana Grill
Bubba Gump Shrimp Co.	Hard Rock Café	O'Charley's	Texas de Brazil
Buca di Beppo	Haru Sushi	Old Spaghetti Factory	TGI Friday's
Burton's Grill	Harvest Seasonal	Olive Garden	The Chophouse
CA Pizza Kitchen	Hillstone	Original Roadhouse	The Palm
Cantina Laredo	Hooked on Harry's	Outback	The Pub
Capital Grille	Houlihan's	Pacific Catch	Thirsty Lion
Carino's	Houston's	Palomino	Tommy Bahama
Carrabba's	Il Fornaio	Pappadeaux	Tom's Urban
Cattlemens	J. Alexanders	Passionfish	Tony Roma's
Champps	J. Gilberts	Paul Martin's	Top Golf
Chart House	Jax Fish House	Perry's Steakhouse	True Food Kitchen
Cheddar's	Joes American	PF Changs	Truluck's
Cheesecake Factory	Joe's Seafood	Phillips Seafood	Uno Chicago Grill
Churrasco's	Joey	Piatti	Village Tavern
City Tap House	Johnny's Italian Stkhse	Pinstripes	Wildfire
Claim Jumper	Katsuya	Plan B Burgers	Winberies
Cleo	Keg Steakhouse	Punch Bowl Social	Wood N Tap
Coastal Flats	Kincaid's	QWRH	Wood Ranch BBQ
Copeland's	King's Bowl	RA Sushi	Yard House
Copper Canyon	King's Fish House	Red Lobster	Zinburger
Counter Burger	Kona Grill	Redstone Grill	
CRAVE	Landry's Seafood	Rock & Brews	
Daily Grill	Lazy Dog	Rock Bottom	
Del Frisco's Grille	Legal Seafood	Romano's MG	
Devon Seafood	Logan's Roadhouse	Roy's	

## On-Premise Insights

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

#### By The Bottle (BTB) Analysis Summary

##### *BTB Breakdown by Wine Type*

Sparkling (+10%) and Still Rose (+28%) wines accounted for most of the growth in 2018.

Wine Type/Color	BTB Distribution by Type/Color						
	2018		2017				
	# Listings	Ave. Price	% Share	# Listings	Ave. Price	% Share	% CHG
All	38847	\$80.19		38756	\$78.72		0.2%
Sparkling	2530	\$116.68	6.5%	2295	\$118.11	5.9%	10.2%
Still	36105	\$77.32	92.9%	36310	\$75.90	93.7%	-0.6%
Red	22085	\$91.06	56.9%	22443	\$88.92	57.9%	-1.6%
Rose	1722	\$37.57	4.4%	1349	\$35.84	3.5%	27.7%
White	12298	\$55.02	31.7%	12518	\$53.83	32.3%	-1.8%
Other	186		0.5%	152		0.4%	22.4%

##### *BTB Breakdown by Country of Origin*

Australia (+13%), France (+8%) and New Zealand (+8%) posted the greatest BTB expansions in 2018. Chile (-33%) and South Africa (-41%) endured massive losses in 2018.

Country	BTB Distribution by Country/Region						
	2018		2017				
	# Listings	Ave. Price	% Share	# Listings	Ave. Price	% Share	% CHG
Grand Total	38847	\$80.19		38756	\$78.72		0.2%
Argentina	1165	\$54.47	3.0%	1234	\$52.38	3.2%	-5.6%
Australia	951	\$78.12	2.4%	841	\$74.74	2.2%	13.1%
Chile	289	\$68.24	0.7%	430	\$66.54	1.1%	-32.8%
France	3099	\$131.60	8.0%	2879	\$131.81	7.4%	7.6%
Germany	246	\$45.41	0.6%	263	\$46.25	0.7%	-6.5%
Italy	6092	\$67.44	15.7%	6205	\$64.67	16.0%	-1.8%
New Zealand	1138	\$45.06	2.9%	1052	\$45.18	2.7%	8.2%
South Africa	131	\$64.67	0.3%	220	\$58.80	0.6%	-40.5%
Spain	780	\$71.37	2.0%	774	\$69.68	2.0%	0.8%
U.S.	24650	\$77.63	63.5%	24587	\$76.52	63.4%	0.3%
Other	306		0.8%	272		0.7%	12.5%
California	20921	\$81.24	53.9%	20950	\$80.02	54.1%	-0.1%
Oregon	900	\$67.87	2.3%	937	\$64.93	2.4%	-3.9%
Washington	2727	\$49.82	7.0%	2591	\$50.11	6.7%	5.2%

##### *BTB Breakdown by Variety*

Prosecco continued its robust growth up 19% following 2017's +44% increase and a +15% jump in 2016. Rhone Blends (+17%) and Red Blends (+12%) also achieved double-digit increases. White Blend (-25%), Merlot (-9%) and Super Tuscan (-9%) endured the steepest declines in 2018.

#### BTB Distribution by Variety

Variety	2018			2017			% CHG
	# Listings	Ave. Price	% Share	# Listings	Ave. Price	% Share	
Grand Total	38847	\$80.19		38756	\$78.73		0.2%
Cabernet Sauvignon	6619	\$107.50	17.0%	6523	\$105.65	16.8%	1.5%
Chardonnay	5246	\$66.81	13.5%	5118	\$65.57	13.2%	2.5%
Pinot Noir	3970	\$69.69	10.2%	4062	\$70.07	10.5%	-2.3%
Merlot	2279	\$58.41	5.9%	2505	\$59.16	6.5%	-9.0%
Pinot Grigio/Gris	2081	\$40.58	5.4%	2160	\$39.66	5.6%	-3.7%
Sauvignon Blanc	2120	\$49.32	5.5%	2100	\$47.95	5.4%	1.0%
Red Blend	2111	\$64.89	5.4%	1889	\$62.10	4.9%	11.8%
Bordeaux Blend	1812	\$175.02	4.7%	1700	\$169.25	4.4%	6.6%
Brut	1293	\$136.80	3.3%	1267	\$133.41	3.3%	2.1%
Riesling	1111	\$42.14	2.9%	1163	\$41.64	3.0%	-4.5%
Malbec	1029	\$50.49	2.6%	1067	\$49.51	2.8%	-3.6%
Moscato Bianco	957	\$32.23	2.5%	991	\$31.86	2.6%	-3.4%
Sangiovese	854	\$70.02	2.2%	902	\$68.78	2.3%	-5.3%
Syrah/Shiraz	689	\$85.35	1.8%	709	\$81.08	1.8%	-2.8%
White Zinfandel	681	\$25.51	1.8%	706	\$25.26	1.8%	-3.5%
Super Tuscan	601	\$121.56	1.5%	659	\$117.74	1.7%	-8.8%
Prosecco	768	\$38.94	2.0%	648	\$38.23	1.7%	18.5%
Zinfandel	609	\$56.31	1.6%	645	\$55.51	1.7%	-5.6%
Rhone Blend	676	\$66.83	1.7%	576	\$68.57	1.5%	17.4%
White Blend	377	\$49.14	1.0%	503	\$49.47	1.3%	-25.0%
Tempranillo	413	\$83.78	1.1%	413	\$78.43	1.1%	0.0%
Corvina Blend	308	\$131.08	0.8%	306	\$110.85	0.8%	0.7%
Brut Rose	292	\$135.28	0.8%	241	\$147.98	0.6%	21.2%
Petite Sirah	210	\$62.83	0.5%	211	\$57.65	0.5%	-0.5%
Other	1752			1692		4.4%	3.5%

## Top 10 Brands By The Bottle

*(Note: Winemetrics On-Premise Wine Distribution Report lists the top 25-50 producers in most categories )*

There were no changes in the top 5 BTB rankings however 14 Hands (#8) and Kim Crawford (#10) broke into the top 10 for the first time in 2018.

2018				2017		
Producer	# Listings	Ave. Price	Rank	Producer	# Listings	Ave. Price
Chateau Ste. Michelle	876	\$40.53	1	Chateau Ste. Michelle	900	\$41.01
Beringer	843	\$61.65	2	Beringer	869	\$58.26
Kendall-Jackson	659	\$39.29	3	Kendall-Jackson	755	\$38.76
Coppola, Francis	575	\$42.66	4	Coppola, Francis	561	\$42.76
Ecco Domani	521	\$28.53	5	Ecco Domani	552	\$27.85
Cavit	505	\$29.27	6	Cavit	498	\$27.57
Meiomi	344	\$46.44	7	La Crema	370	\$47.53
14 Hands	338	\$33.60	8	Cupcake	349	\$27.90
Mark West	325	\$30.77	9	Meiomi	316	\$46.93
Crawford, Kim	319	\$44.04	10	Mark West	313	\$31.98