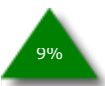



## Wine Industry Metrics - November 2013

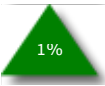

Wines Vines Analytics

### 52% Growth in Winery Hiring Activity Leads November Metrics

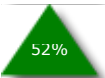

Wine Industry Metrics for November showed 7% growth in off-premise sales, 1% growth in direct-to-consumer shipments and 52% growth in winery hiring activity. These three metrics were also positive when considering the 12-month period through November compared to the previous 12 months.

<b>Off-Premise Sales »</b>	<b>Month</b>	<b>12 Months</b>
November 2013	\$673 million	\$7,428 million
November 2012	\$615 million 	\$6,823 million 

<b>Direct-to-Consumer Shipments »</b>	<b>Month</b>	<b>12 Months</b>
November 2013	\$225 million	\$1,558 million
November 2012	\$224 million 	\$1,442 million 

<b>Winery Job Index »</b>	<b>Month</b>	<b>12 Months</b>
November 2013	134	196
November 2012	88 	157 

Data sources: IRI, ShipCompliant, winejobs.com

The jump in the Winery Job Index calculated by Winejobs.com was especially noteworthy because of its size and timing, coming at the end of the tourism season when winery staffing needs usually tend to decrease.

## WINES & VINES

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