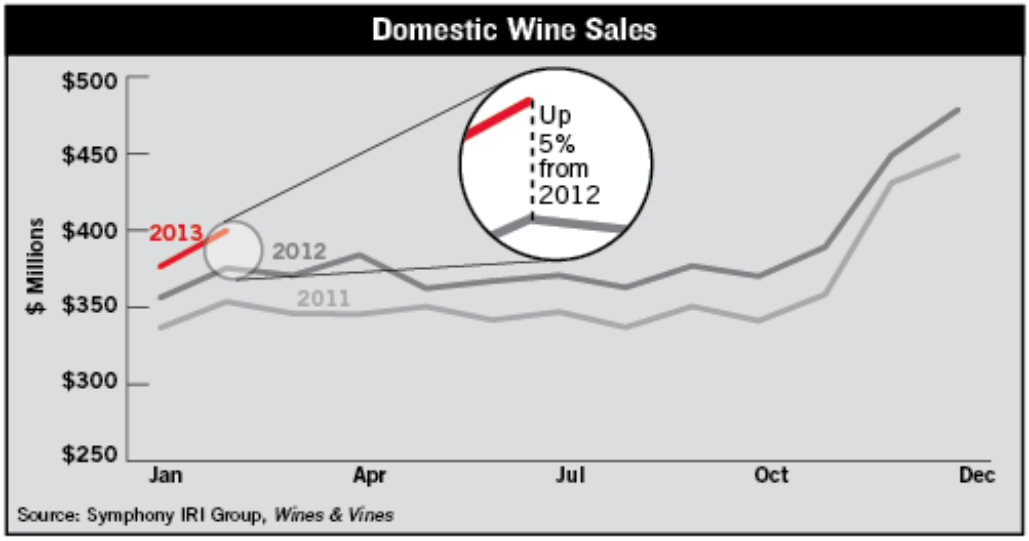
Wine Industry Metrics - Off-Premise Sales - February 2013

Wines Vines Analytics

Domestic Table Wines Up 5% in February, 6% in 12 Months

Off-premise sales of domestic table wines in February continued their long-term growth trend, hitting 5% growth in value for the month vs. a year ago, and measuring 6% up for the past 12 months. In February 2012 the 12-month growth rate was 8%, so growth has decelerated gradually over the past year. By contrast, imported table wines were flat for the month and the past 12 months at the major food and drug stores where the Symphony IRI Group measures sales.

Off-Premise Sales »	Month	12 Months
February 2013	$400 million	$5,081 million
February 2012	$380 million	$4,795 million
	5%	6%



Two Months of Retail Growth to Start the Year

February was the second growth month of the year for domestic wine sales, even as the pace slackened to 5%. Washington and Oregon wines grew at 6%. Domestic table wines rose in price by 30 cents compared to February 2012.

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Top 30 Momentum Table Wine Brands of 2012

RANK	TABLE WINE BRAND	PRODUCER	PRICE SEGMENT	ORIGIN
1	Cupcake Vineyards	The Wine Group	$8-$10.99	California
2	14 Hands	Chateau Ste. Michelle	$8-$10.99	Washington
3	Barefoot	E&J Gallo Winery	$5-$7.99	California
4	Liberty Creek	E&J Gallo Winery	< $3.50	California
5	Apothic Ca	E&J Gallo Winery	$8-$10.99	California
6	Black Box Wines Box	Constellation Wines US	> $3.50	California
7	Bota Box	Delicato Family Vineyards	> $3.50	California
8	Rex Goliath	Constellation Wines US	$5-$7.99	California
9	Stella Rosa	San Antonio Winery	$11-$14.99	Italy
10	Chateau Ste. Michelle	Chateau Ste. Michelle	$8-$10.99	Washington
11	Bogle Vineyards	Bogle Vineyards	$8-$10.99	California
12	Woodbridge By Robert Mondavi	Constellation Wines US	$5-$7.99	California
13	Alamos	E&J Gallo Winery	$8-$10.99	Argentina
14	The Naked Grape	E&J Gallo Winery	$5-$7.99	California
15	Menage A Trois	Trinchero Family Estates	$8-$10.99	California
16	Gallo Family Vineyards	E&J Gallo Winery	$3.50-$4.99	California
17	J. Lohr	J. Lohr Winery	$11-$14.99	California
18	Flipflop	The Wine Group	$5-$7.99	California
19	The Dreaming Tree	Constellation Wines US	$11-$14.99	California
20	Franzia Box	The Wine Group	< $3.50	California
21	Vendange Box	Constellation Wines US	> $3.50	California
22	Edna Valley Vineyard	E&J Gallo Winery	$11-$14.99	California
23	Joel Gott	Joel Gott Wines	$11-$14.99	California
24	Mark West Vineyards	Constellation Wines US	$11-$14.99	California
25	Clos Du Bois	Constellation Wines US	$11-$14.99	California
26	Nobilo Regional Collection	Constellation Wines US	$11-$14.99	New Zealand
27	Gnarly Head	Delicato Family Vineyards	$8-$10.99	California
28	Noble Vines	Delicato Family Vineyards	$11-$14.99	California
29	Entwine	Wente Family Vineyards	$11-$14.99	California
30	Simply Naked	Constellation Wines US	$8-$10.99	California

The Top Momentum Table Wine Brands of 2012 are those with high volume and value as well as fast growth rates.

Source: Symphony IRI Group year 2012 week ending Jan 6, 2013, Infoscan total U.S. multi-outlet.

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The Top 30 Momentum Table Wine Brands include some familiar names such as Cupcake, Barefoot and Rex Goliath. New entrants include Joel Gott, Edna Valley Vineyards, Entwine and Simply Naked. To create the Momentum Brands list the Symphony IRI Group (SIG) started with the top 250 brands by volume in from their total U.S. multi-outlet results for 52 weeks ending Jan. 6, 2013, and created a power ranking by the following measures:

- Volume sales
- Volume sales actual changes vs. year ago
- Volume sales % change vs. year ago
- Quality merchandising incremental collars (feature and/or display)

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- Dollar sales actual change vs. year ago
- Dollar sales % change vs. year ago
- Unit sales actual change vs. year ago
- Unit sales % change vs. year ago
- Average price per 750 ml % change vs. year ago
- Velocity in dollars
- Velocity % change vs. year ago in dollars

SIG ranked brands for each measure (low to high) and awarded points based on 2012 sales performance. For example, the brand with the highest volume sales received 1 point and the brand with the lowest volume sales received 250 points. This methodology was consistent for each measure used. Points received across each measure were added for a sum total by brand resulting in the final point total. Brands were ranked in ascending order of "total points" to determine the final 2012 Top 30 Table Wine Momentum Brands.

Top 20 New Table Wine Brands of 2012

RANK	BRAND	SALES	PRODUCER	AVG. PRICE/ 750ML	ORIGIN
1	Skinnygirl	$4,744,489	Beam Global	$13.02	California
2	Be	$3,171,366	Treasury Wine Estates	$8.48	California
3	Bella Bolle	$2,411,898	Prestige Wine Group	$8.37	Italy
4	Acronym	$1,493,272	Winery Exchange	$9.30	California
5	Macaron	$1,373,152	The Wine Group	$8.14	Italy
6	Fancy Pants	$1,343,155	Trinchero Family Estates	$9.38	California
7	Thorny Rose	$1,326,270	Constellation Brands	$9.91	Washington
8	Wine Sisterhood	$778,289	Canopy Management	$10.23	California
9	Flirt	$764,181	Vintage Wine Estates	$9.92	California
10	Ooh La La	$736,064	Constellation Brands	$9.43	California
11	Barefoot Refresh	$686,625	E. & J. Gallo Winery	$6.47	California
12	Butterfly Kiss	$652,999	Diageo Chateau & Estate	$10.41	California
13	Zonin Winemakers Col.	$652,720	Casa Vinicola Zonin	$7.62	Italy
14	Curious Beasts	$478,954	Truett-Hurst	$14.42	California
15	Flame Lily	$425,550	Trinchero Family Estates	$8.90	California
16	Insomnia	$397,785	Terravant Wine Co.	$9.25	California
17	Artisan Vintners Guild	$392,884	Artisan Vintners Guild	$9.04	California
18	Stark Raving	$370,416	Diageo Chateau & Estate	$10.48	California
19	Alvarez de Toledo	$361,387	Alvarez de Toledo Wine Group	$8.64	Spain
20	Aura	$333,340	E. & J. Gallo Winery	$10.02	California

Fifteen of the top 20 new brands off-premise are from California, with three from Italy and one each from Spain and Washington. Data from year 2012 week ending Jan. 6, 2013, Infoscan total U.S. multi-outlet.

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Brands with eye-catching names, and some with themes aimed at women consumers dominated the Top 20 New Brands of 2012 as picked by the Symphony IRI Group from off-premise sales data. The top four brands were launched by wine companies other than the big three – E. & J. Gallo, The Wine Group and Constellation Brands. Skinnygirl by Beam Global ranked No. 1 and led No. 2 Be wines from Treasury Wine Estates by more than $1.5 million cases.

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