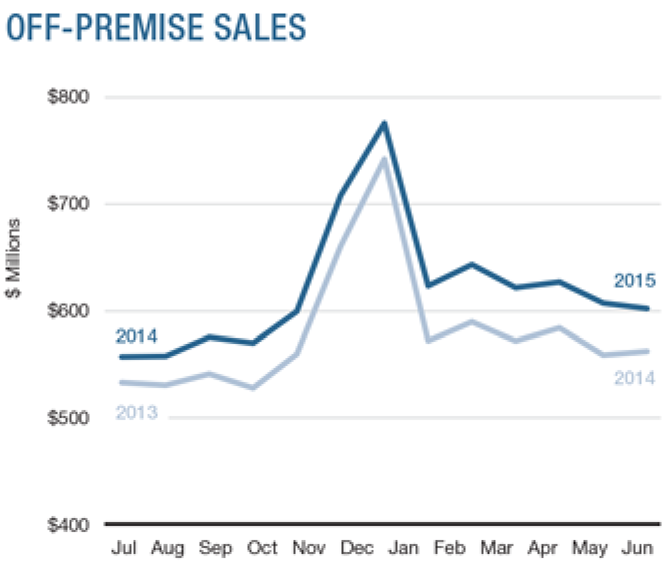
Wine Industry Metrics - Off-Premise Sales - June 2015

Wines Vines Analytics

Growth Rate for Off-Premise Sales Rises to 6%

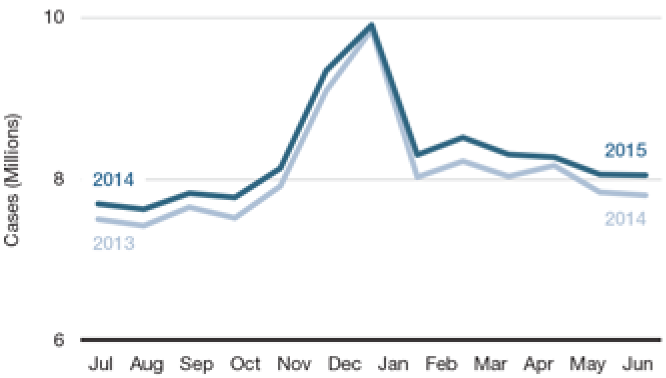
The 52-week rate of growth for off-premise dollar sales accelerated by 1 point to 6% in June for combined domestic table wine and sparkling wine, according to Wines & Vines analysis of IRI data. It was the first time since November 2014 that this metric had changed. Sales for the most recent four-week period through June 14 grew by 5% compared to a year previously.

Off-Premise Sales IRI Channels »	**Month**	**12 Months**
June 2015	$608 mil	$8,174 mil
June 2014	$571 mil	$7,676 mil



Source: IRi, Wines Vines Analytics. Domestic table and sparkling wine sales in multiple-outlet and convenience stores, four weeks ending June 14, 2015.

OFF-PREMISE VOLUME



Source: IRi, Wines Vines Analytics. Domestic table and sparkling wine sales in multiple-outlet and convenience stores, four weeks ending June 14, 2015.

Barefoot wines from E. & J. Gallo Winery continued to lead all other brands in off-premise sales over the past 52 weeks as measured by IRI, the Chicago-based market research firm. Barefoot increased its lead on No. 2 Sutter Home during the past year. Only one of the brands priced at $9 and up per 750ml dropped in sales while seven of those priced under $9 dropped.

OFF-PREMISE TOP 20 TABLE WINE BRANDS

Rank	Brand	Parent/Importer	52-Week Sales (Millions)	Sales Change	Volume Change	Average Price (750ml)	Price Change
1	Barefoot	E. & J. Gallo	$622	5%	7%	$5.64	-$0.08
2	Sutter Home	Trinchero Family Estates	$356	-2%	-3%	$5.25	$0.02
3	Franzia Box	The Wine Group	$325	0%	-5%	$2.17	$0.11
4	Woodbridge By Robert Mondavi	Constellation Brands	$318	4%	5%	$5.51	-$0.04
5	Yellow Tail (Australia)	Deutsch Family Wine & Spirits	$289	-5%	-4%	$5.70	-$0.08
6	Kendall Jackson Vintners Reserve	Jackson Family Wines	$198	2%	2%	$12.05	$0.07
7	Beringer	Treasury Wine Estates	$172	1%	3%	$4.97	-$0.11
8	Chateau Ste. Michelle	Ste. Michelle Wine Estates	$164	12%	12%	$9.80	-$0.01
9	Cupcake Vineyards	The Wine Group	$159	1%	3%	$9.04	-$0.15
10	Menage A Trois	Trinchero Family Estates	$155	24%	23%	$9.37	$0.10
11	Gallo Family Vineyards	E. & J. Gallo	$150	-2%	-1%	$4.14	-$0.05
12	Apothic	E. & J. Gallo	$128	21%	21%	$9.58	$0.00
13	Carlo Rossi	E. & J. Gallo	$128	-3%	-1%	$2.50	-$0.05
14	Black Box Wines	Constellation Brands	$119	23%	22%	$4.96	$0.00
15	Bogle Vineyards	Bogle Vineyards	$116	15%	15%	$9.47	$0.01
16	Clos Du Bois	Constellation Brands	$105	-2%	0%	$9.74	-$0.27
17	Robert Mondavi Private Selection	Constellation Brands	$104	-4%	-3%	$8.36	-$0.13
18	Livingston Cellars	E. & J. Gallo	$98	-5%	-4%	$3.20	-$0.02
19	14 Hands	Ste. Michelle Wine Estates	$94	17%	17%	$9.79	$0.02
20	Rex Goliath	Constellation Brands	$94	-4%	-5%	$5.20	$0.06

Source: IRi. All table wine in multiple outlet and convenience stores, 52 weeks through June 14, 2015.

CONCENTRATION AMONG THE TOP 20

Off-Premise Sales Top Companies in Top 20 Brands	Brands	52-Week Sales (Millions)
E. & J. Gallo	Barefoot, GFV, Apothic, Carlo Rossi, Livingston Cellars	$1,126
Constellation Brands	Woodbridge, Black Box Wines, Clos Du Bois, Robert Mondavi Private, Rex Goliath	$740
Trinchero Family Estates	Sutter Home, Menage a Trois	$511
The Wine Group	Franzia Box, Cupcake	$484
Jackson Family Wines	Kendall Jackson Vintners Reserve	$198
Treasury Wine Estates	Beringer	$172

Source: IRi. All table wine in multiple outlet and convenience stores, 52 weeks through June 14, 2015.

Six wine companies own 16 of the top 20 brands in off-premise sales, and account for 83% of the top 20 brand sales.

About IRI Channels

Sourced from Chicago-based IRI, these figures cover sales in multiple-outlet and convenience store channels. These include grocery, drug, mass marketers, membership clubs, dollar and convenience stores. Liquor store sales are not included.

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