

Wine Industry Metrics - Off-Premise Sales - July 2015

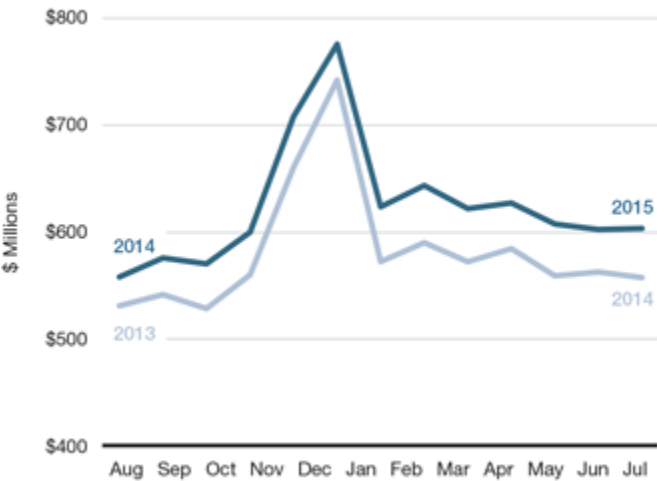
Wines Vines Analytics

Sparkling Wine Helps Off-Premise Sales Grow 6%

Both four-week and 52-week sales of domestic table and sparkling wine in off-premise locations grew 6% in value in July compared to a year ago, according to an analysis of data from IRI, the Chicago-based market research firm. Sparkling wine sales alone increased 9% in July and 8% in 52 weeks.

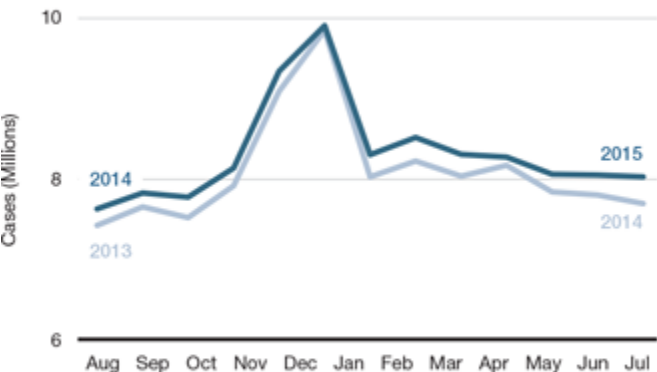
| Off-Premise Sales IRI Channels » | Month | 12 Months |
|-------------------------------------|-----------|-------------|
| | | |
| July 2015 | \$595 mil | \$8,012 mil |
| July 2014 | \$568 mil | \$7,701 mil |

OFF-PREMISE SALES



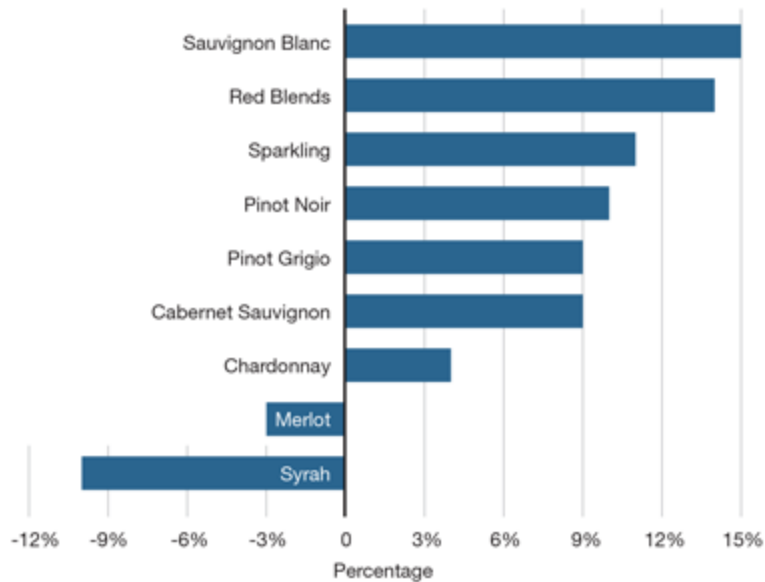
Source: IRI, Wines Vines Analytics. Domestic table and sparkling wine sales in multiple-outlet and convenience stores, four weeks ending July 12, 2015.

OFF-PREMISE VOLUME



Source: IRI, Wines Vines Analytics. Domestic table and sparkling wine sales in multiple-outlet and convenience stores, four weeks ending July 12, 2015.

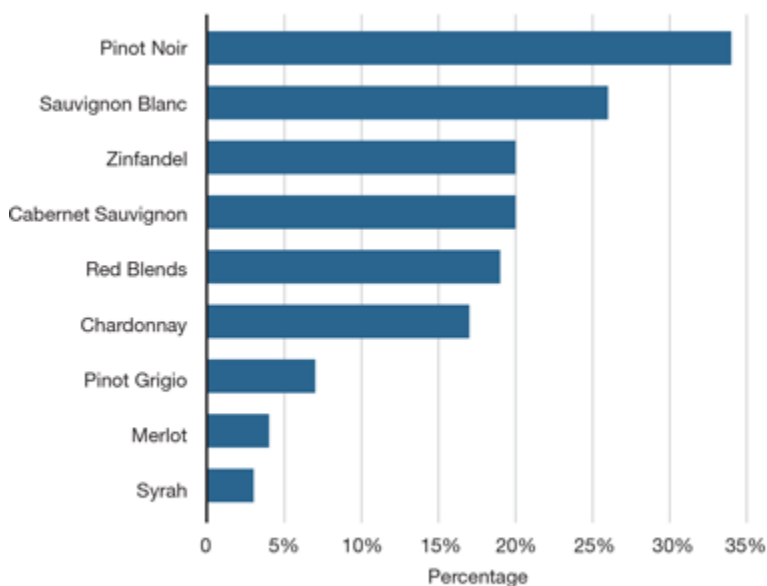
OFF-PREMISE SALES GROWTH RATE BY VARIETAL



Source: IRI. All table wine in multiple outlet and convenience stores, 52 weeks through July 12, 2015.

Sauvignon Blanc had the fastest sales growth rate (from a small base) of any major varietal or type during the most recent 52-week period. Red blends/Meritage wines were close behind in growth percentage but from a much bigger base. These rates reflect domestic and imported wines combined.

OFF-PREMISE SALES GROWTH RATE \$20-PLUS



Source: IRI. All table wine in multiple outlet and convenience stores, 52 weeks through July 12, 2015.

Pinot Noir sales grew by 34% in the most recent 52 weeks, which was faster than all other major varietals or types in the \$20-plus per bottle segment, according to IRI. Six of the nine varietals shown grew in double digits.

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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