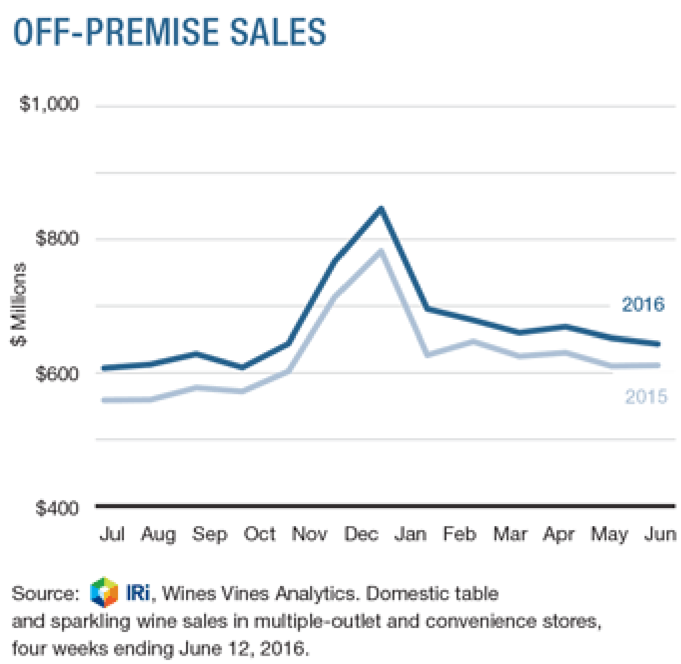
Wine Industry Metrics - Off-Premise Sales - June 2016

Wines Vines Analytics

Domestic Wine Grows 5% in June; Barefoot Remains No. 1

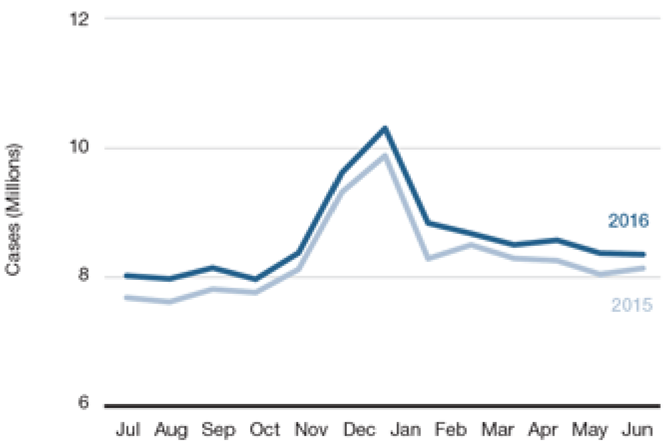
Off-premise sales of domestic wine grew steadily through June, marking the third month in a row that measured 5% monthly growth and 6% 52-week growth, according to IRI's scan data. A review of the Top 20 Table Wine Brands showed that Barefoot remained No. 1 in sales.

Off-Premise Sales IRI Channels »	Month	12 Months
June 2016	$622 mil	$8,422 mil
June 2015	$608 mil	$8,174 mil



Sales of domestic wine reached $638 million during the four weeks ending June 12 in the multiple outlet and convenience store data from IRI, the Chicago-based market research firm.

OFF-PREMISE VOLUME



Source: IRi, Wines Vines Analytics. Domestic table and sparkling wine sales in multiple-outlet and convenience stores, four weeks ending June 12, 2016.

Volume growth of domestic table and sparkling wines in IRI channels was slower than value. June volume was up just 1% from last June.

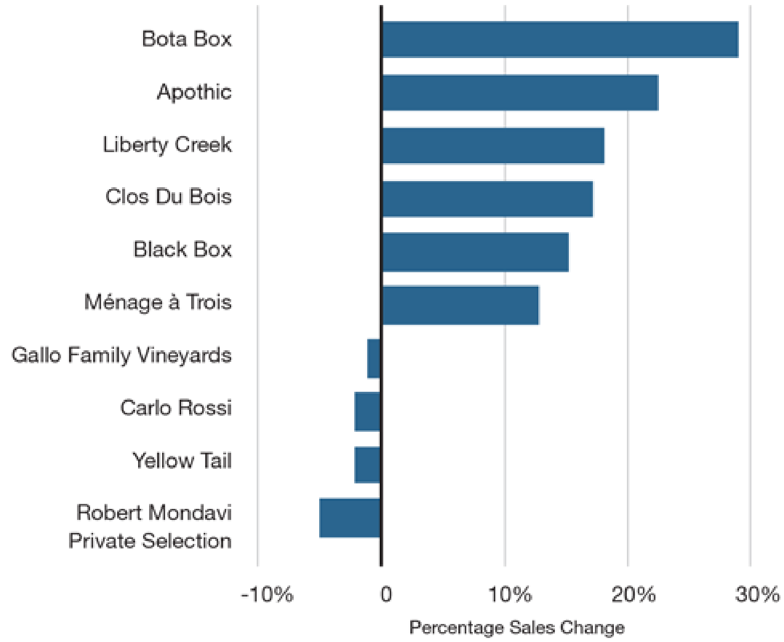
TOP 20 OFF-PREMISE TABLE WINE BRANDS

Rank	Brand	Parent/Importer	52-Week Sales (Millions)	Sales Change	Average Price (750ml)	Price Change
1	Barefoot	E. & J. Gallo	$665	7%	$5.58	-$0.06
2	Sutter Home	Trinchero Family Estates	$359	1%	$5.37	$0.11
3	Woodbridge by Robert Mondavi	Constellation Brands	$334	5%	$5.52	$0.02
4	Franzia Box	The Wine Group	$331	2%	$2.23	$0.06
5	Yellow Tail	Deutsch Family Wine & Spirits	$281	-3%	$5.64	-$0.08
6	Kendall-Jackson Vintners Reserve	Jackson Family Wines	$207	5%	$12.01	-$0.04
7	Chateau Ste. Michelle	Ste. Michelle Wine Estates	$176	7%	$9.91	$0.10
8	Ménage à Trois	Trinchero Family Estates	$174	12%	$9.71	$0.34
9	Beringer	Treasury Wine Estates	$173	1%	$4.98	$0.01
10	Cupcake	The Wine Group	$162	2%	$9.00	-$0.05
11	Apothic	E. & J. Gallo	$156	22%	$9.47	-$0.11
12	Gallo Family Vineyards	E. & J. Gallo	$152	-1%	$4.14	-$0.04
13	Black Box	Constellation Brands	$138	15%	$5.03	$0.05
14	Bogle Vineyards	Bogle Vineyards	$126	9%	$9.47	$0.00
15	Carlo Rossi	E. & J. Gallo	$124	-3%	$2.52	$0.02
16	Clos Du Bois	Constellation Brands	$122	17%	$9.49	-$0.25
17	14 Hands	Ste. Michelle Wine Estates	$105	11%	$9.78	-$0.01
18	Bota Box	Delicato Family Vineyards	$103	29%	$4.75	-$0.02
19	Liberty Creek	E. & J. Gallo	$103	18%	$3.48	$0.01
20	Robert Mondavi Private Selection	Constellation Brands	$99	-5%	$8.42	$0.06

Source: IRi, All table wine in multiple outlet and convenience stores, 52 weeks through June 12, 2016.

The Barefoot brand of E. & J. Gallo kept the No. 1 spot on the Top 20 Table Wine Brands ranking, based on IRI off-premise sales data. Sutter Home stayed at No. 2 but Woodbridge by Robert Mondavi passed Franzia box wines for the No. 3 spot. Bota Box at No. 19 and Liberty Creek at No. 20 nudged Livingston Cellars and Rex Goliath off the list.

MOMENTUM CHANGE FOR OFF-PREMISE BRANDS



Source: IRI, Selected from the Top 20 Brands. All table wine in multiple outlet and convenience stores, 52 weeks through June 12, 2016.

Two bag-in-box wine brands–Bota Box from Delicato Family and Black Box from Constellation–were among the fastest growing in the Top 20 Table Wine Brands from IRI. Constellation also had the fastest shrinking brand off-premise, Robert Mondavi Private Selection.

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.

WINES & VINES

866.453.9701 | 415.453.9700 | Fax: 415.453.2517 | 65 Mitchell Blvd., Ste. A San Rafael, CA 94903
info@winesandvines.com

